Training Manual/System Users Guide
Effective Date: 5/2/2019

Table of Contents

Pre-Grant Award Information

Partnership Profile
MATT 2.0 Application
Activities designed to improve the quality of life of the residents of low or moderate income housing or of an area undergoing neighborhood conservation or renewal:

- Beautification
- Neighborhood Public Amenity Enhancements
- Housing Enhancements to owner-occupied single-family homes

MATT 2.0 Grant User Guide

- Area boundaries that are primarily residential
- Census tracts/block groups that have at least 51% low/mod residents
- Households receiving direct assistance must be at or below 120% area median income

MATT 2.0 FSR User Guide
A successful place-based project must be in an eligible area and/or result in an eligible beneficiary.

Partnership Profile User Guide
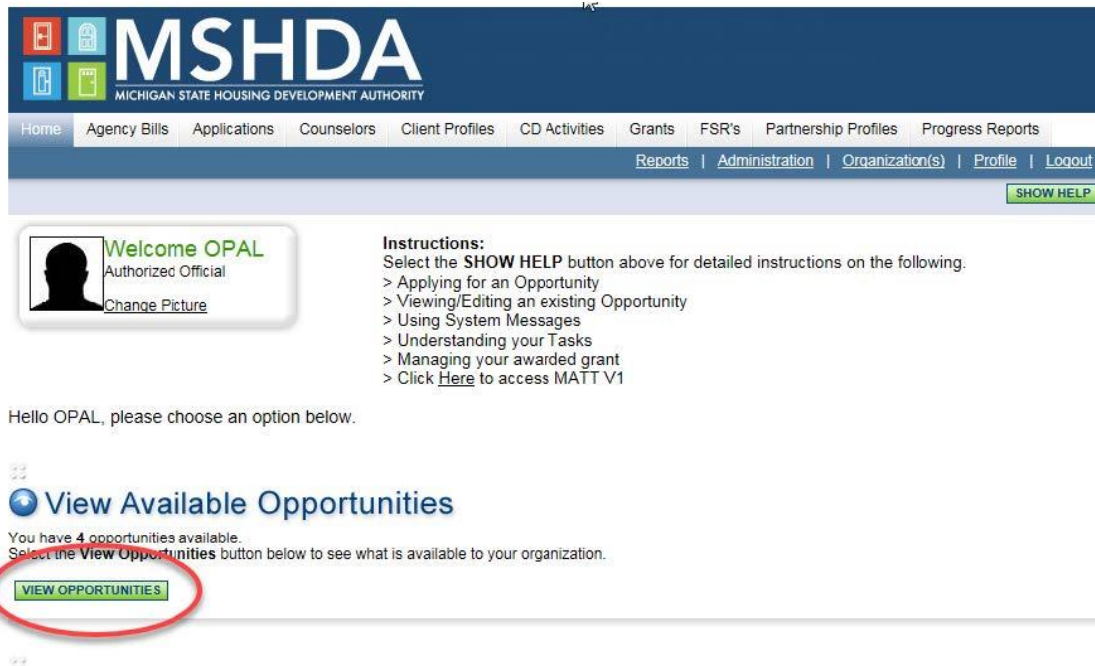
Creating a Partnership Profile

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

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

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

Partnership Profile User Guide (continued)

Create Partnership Profile

After clicking on the "View Opportunities" button all available opportunities are displayed. Search for the Partnership Profile for (your Org Name) and click on the "Create Partnership Profile" button.

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

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

Partnership Profile Period:
not set

Partnership Profile Due Date:
not set

Description:

CREATE PARTNERSHIP PROFILE

Completing Your Partnership Profile

Partnership Profile Menu

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

Back
Partnership Profile Menu

Document Information: PP-1003-00010
Details

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

View, Edit and Complete Forms

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

VIEW FORMS

Partnership Profile User Guide (continued)

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

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

Back

Partnership Profile Menu - Forms
Please complete all required forms below.

Document Information: PP-MSHDA--00682

Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	HRF Test Org	Authorized Official	Profile In Progress	01/01/2015 - N/A N/A

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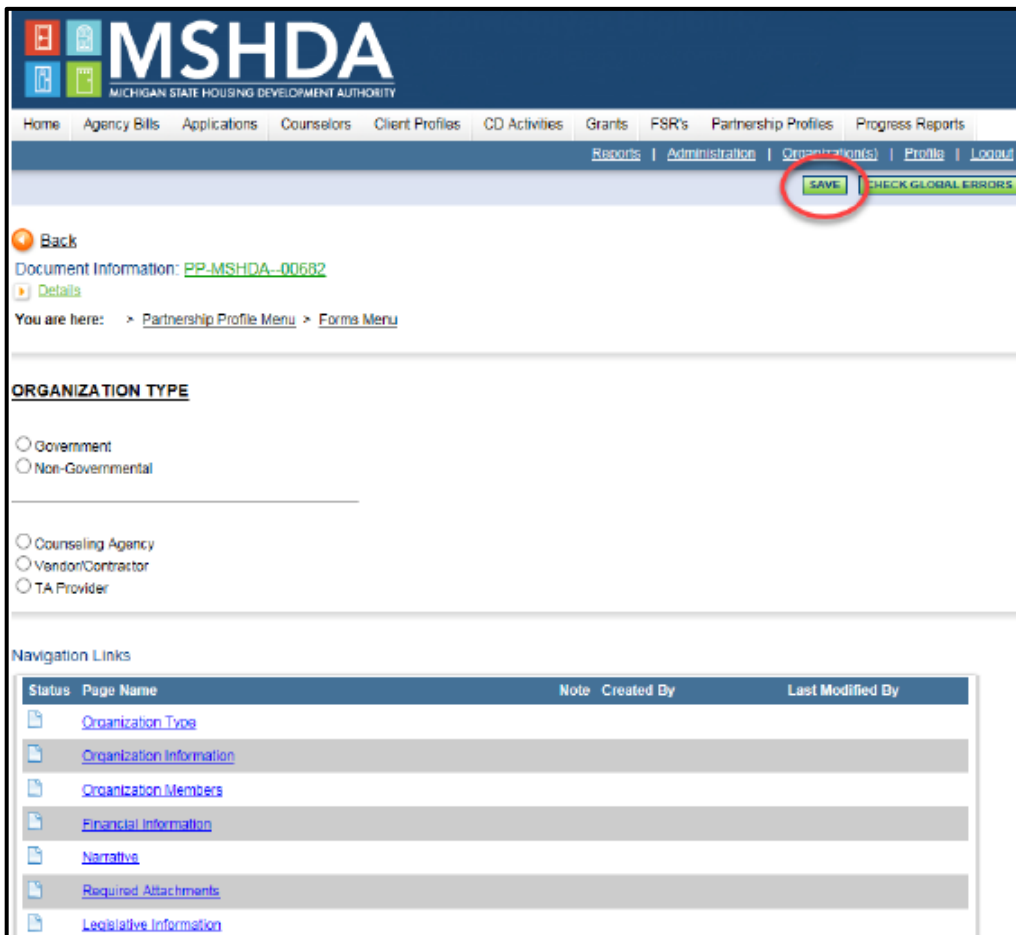
Status	Page Name		Note	Created By	Last Modified By
	Partnership Profile Forms				
	Organization Type				
	Organization Information				
	Organization Members				
	Financial Information				
	Narrative				
	Required Attachments				
	Legislative Information				

Partnership Profile User Guide (continued)

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Saving a Form

Select your Organization Type. If you do not know your organization type, please contact your MSHDA Specialist.

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

Partnership Profile User Guide (continued)

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Form Navigation

After saving the Organization Types form, the Navigation Links are available at the bottom of each form. Use these navigation links to navigate directly to any form in the menu. Additionally, the Forms Menu at the top of the forms, navigates back to the Partnership Profile Forms Menu.

🔴 Back

Document Information: PP-MSHDA--00682

▶ Details

You are here: > Partnership Profile Menu > Forms Menu

ORGANIZATION TYPE

○ Government
○ Non-Governmental

○ Counseling Agency
○ Vendor/Contractor
○ TA Provider

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
📄	Organization Type			
📄	Organization Information			
📄	Organization Members			
📄	Financial Information			
📄	Narrative			
📄	Required Attachments			
📄	Legislative Information			

Partnership Profile User Guide (continued)

Form Menu Features

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

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

Forms

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

The icon below shows that the page has been saved.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Type		Offical , OPAL 6/5/2013 3:37:45 PM	
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

Partnership Profile User Guide (continued)

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

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Status	Page Name	Note	Created By	Last Modified By
	Partnership Profile Forms			
	Organization Type			
	Organization Information			
	Financial Information		Stars Admin 6/7/2013 3:13:26 PM	
	Narrative			
	Required Attachments			
	Legislative Information			

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

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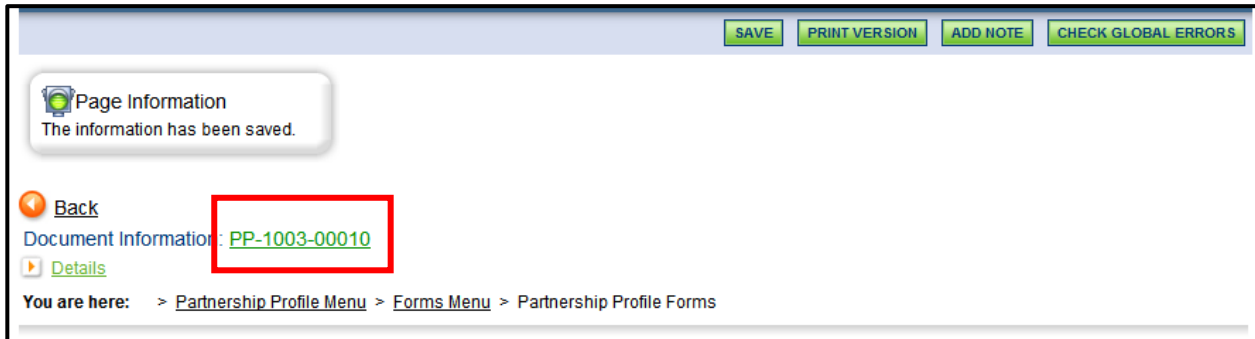
Status	Page Name	Note	Created By	Last Modified By
	Organization Type		Offical , OPAL 6/5/2013 3:37:45 PM	
	Organization Information		Offical , OPAL 6/5/2013 4:01:00 PM	Offical , OPAL 6/5/2013 4:02:41 PM
	Financial Information		Offical , OPAL 6/5/2013 4:04:05 PM	
	Narrative		Offical , OPAL 6/5/2013 4:05:08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

Partnership Profile User Guide (continued)

Submitting your Partnership Profile

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

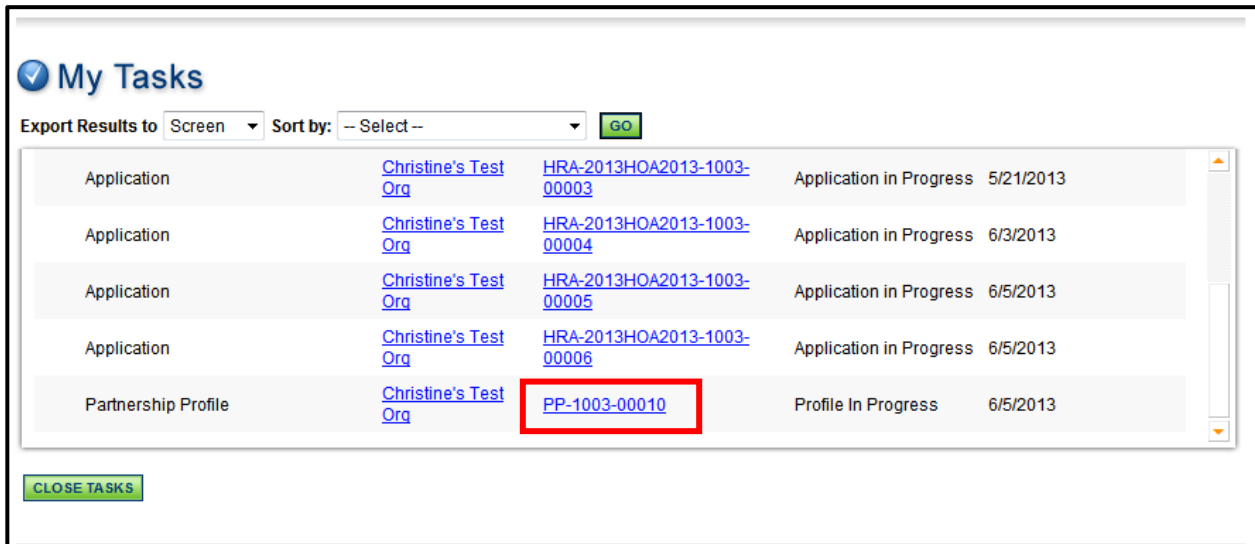|				SAVE	PRINT VERSION	ADD NOTE	CHECK GLOBAL ERRORS

Page Information
The information has been saved.

Back
Document Information : PP-1003-00010
Details

You are here: > Partnership Profile Menu > Forms Menu > Partnership Profile Forms

Task List

My Tasks

Export Results to Screen   ▾ Sort by: -- Select --   ▾   GO

Application	Christine's Test Org	HRA-2013HOA2013-1003-00003	Application in Progress	5/21/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00004	Application in Progress	6/3/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00005	Application in Progress	6/5/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00006	Application in Progress	6/5/2013
Partnership Profile	Christine's Test Org	PP-1003-00010	Profile In Progress	6/5/2013

CLOSE TASKS

Partnership Profile User Guide (continued)

Partnership Profile tab search tab

Search Partnership Profiles

Use the search functionality below to find a specific Partnership Profile.

Click here for an advanced version of this search.

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

Organization Name	
Organization Number	
County	Alcona / Alger / Allegan / Alpena
Status	

SEARCH   CLEAR

Export Results to Screen ▾ Results Per Page 20 ▾ Sort By -- SELECT -- ▾ ASCENDING ▾
Number of Results **1**

Results

Agency	Profile Name	CD Specialist	County	Region	Status	Date Last Submitted	Date Created	Date Approved
HRF Test Org 1	PP-MSHDA-- 00682		Ingham County	Region 7	Profile In Progress		05/24/17	

Partnership Profile User Guide (continued)

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

Back

Partnership Profile Menu

Document Information: PP-1003-00010

▾ Details

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

🗋 View, Edit and Complete Forms

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

VIEW FORMS

➔ Change the Status

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

VIEW STATUS OPTIONS

Partnership Profile User Guide (continued)

Submit or Cancel your Profile.

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MSHDA
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

| Home | Agency Bills | Applications | Counselors | Client Profiles | CD Activities | Grants | FSR's | Partnership Profiles | Progress Reports |

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

SHOW HELP

◀ Back

Partnership Profile Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: PP-MSHDA--00682

🔻 Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	HRF Test Org	Authorized Official	Profile In Progress	01/01/2015 - N/A N/A

Possible Statuses

PROFILE SUBMITTED

APPLY STATUS ⬅ Click here to submit your profile

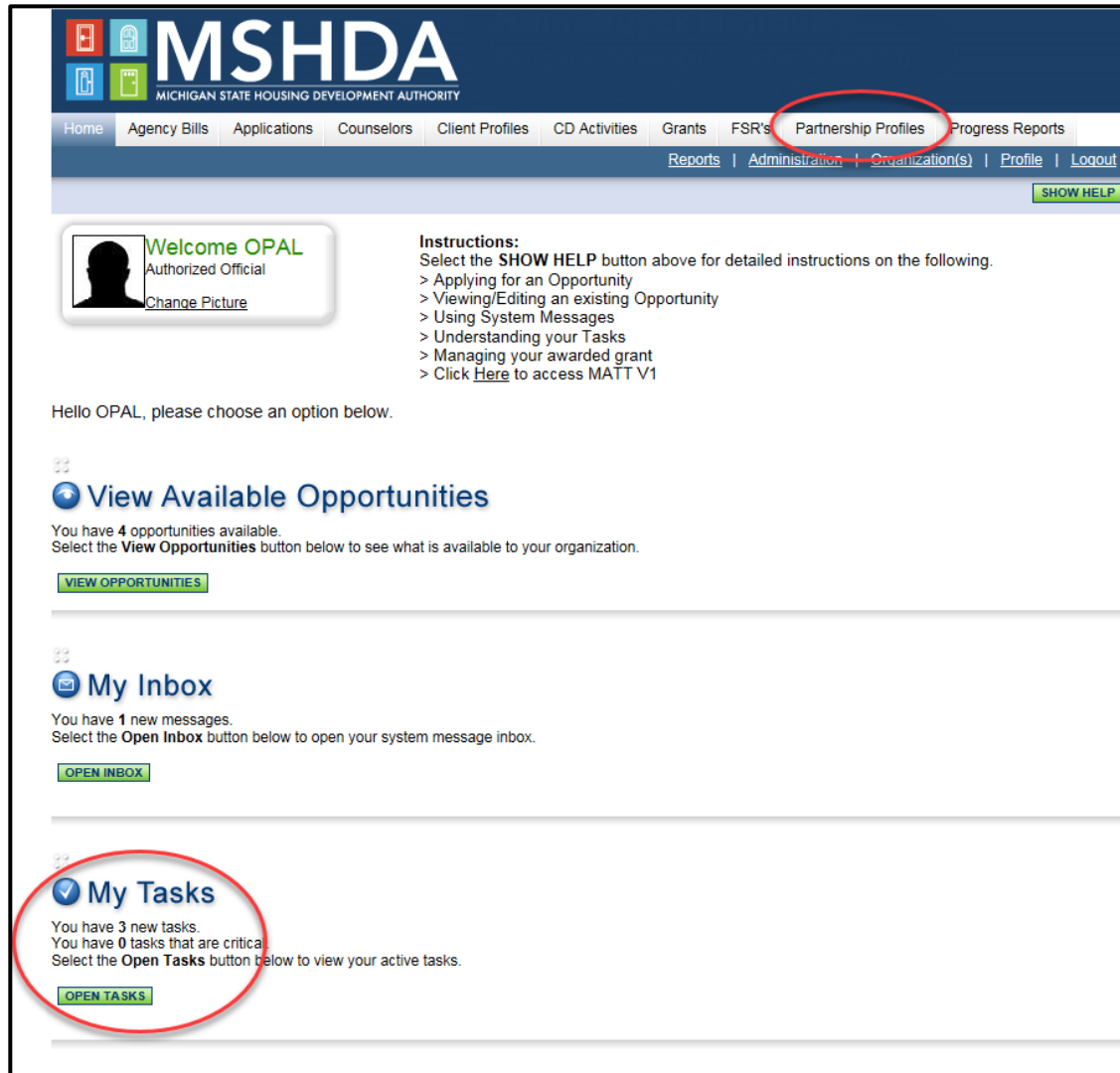**PROFILE CANCELLED**

APPLY STATUS ⬅ Click here to cancel your profile

Partnership Profile User Guide (continued)

Accessing your Partnership Profile

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The Partnership Profile can be accessed from the Home screen by clicking the "Open Tasks" button located in the My Tasks section or on the Partnership Profiles tab search page near the top of the home screen.

Partnership Profile User Guide (continued)

My Tasks

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

My Tasks

Export Results to [Screen ▾] Sort by: [-- Select -- ▾] [GO]

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	HRF Application	HRF Test Org	HRF-2016-XXX-01	Application in Progress	5/1/2017	
	HRF Application	HRF Test Org	HRF-2016-XXX-02	Application in Progress	5/10/2017	
	Partnership Profile	HRF Test Org	PP-MSHDA--00682	Profile In Progress	5/24/2017	

[CLOSE TASKS]

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

Click on the Partnership Profile Name link (circled below). This link navigates to the Partnership Profile Menu. *(see image on next page)*

Partnership Profile User Guide (continued)

Search Partnership Profiles

Use the search functionality below to find a specific Partnership Profile.

Click here for an advanced version of this search.

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

Organization Name [   ]

Organization Number [   ]

County
| Alcona |
| Alger |
| Allegan |
| Alpena |

Status [▼]

[SEARCH] [CLEAR]

Export Results to [Screen ▼] Results Per Page [20 ▼] Sort By [-- SELECT -- ▼] [ASCENDING ▼]
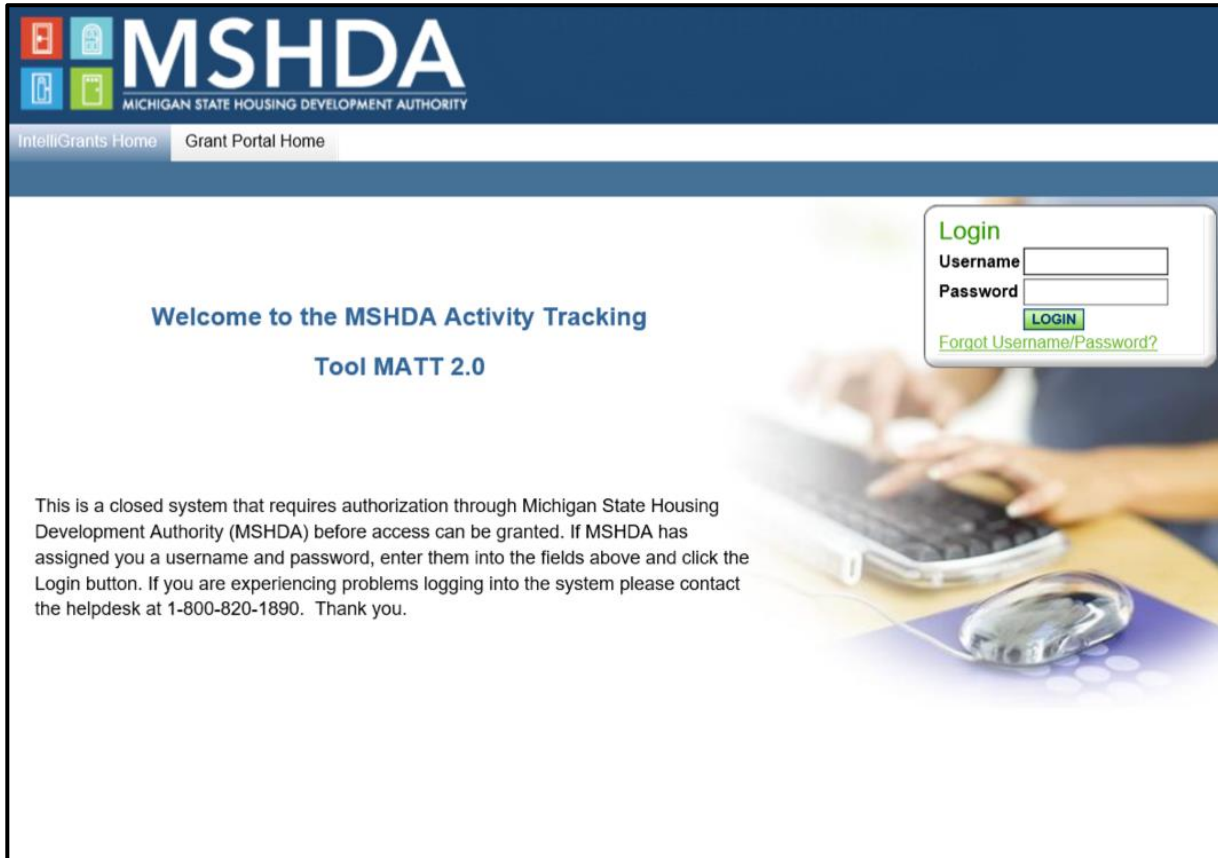
Number of Results **1**

Results

Agency	Profile Name	CD Specialist	County	Region	Status	Date Last Submitted	Date Created	Date Approved
HRF Test Org	PP-MSHDA--00682		Ingham County	Region 7	Profile In Progress		05/24/17	
1								

HRF Application User Guide

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HRF Application User Guide (continued)

Initiating the HRF Application

Only the *Authorized Official* or *Administrator* can initiate an application. To initiate the HRF Application, select the link **View Opportunities** in the "View Available Opportunities" section.

HRF Application User Guide (continued)

Locate the HRF Application and select the **APPLY NOW** button.

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HRF Application for BJ's Testing Organization
Offered By:
MIMSHDA_OPAL

Application Availability Dates:
09/19/2016-open ended

Application Period:
09/19/2016-open ended

Application Due Date:
not set

Description:

APPLY NOW   NOT INTERESTED

Agreement Page - You must select the **I AGREE** button to continue.

Agreement
Please make a selection below to continue.

If you wish to create a new application, click "I Agree". If you wish to continue work on an application already In Progress, click "I Do Not Agree", to return to the home page. The application that is In Progress will be available in the My Tasks section.

I AGREE   I DO NOT AGREE

HRF Application User Guide (continued)

How to navigate the Application

There is a new menu navigation for the application. To view the links, hover (hold the mouse) over the link, and the options for that section will appear. This does not apply to the **Menu** link.
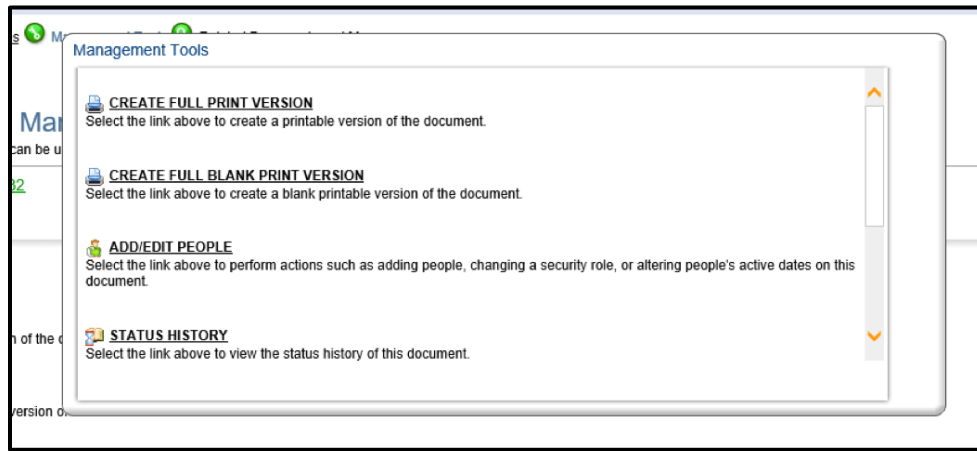
Here is what each one should look like:

Forms Menu:
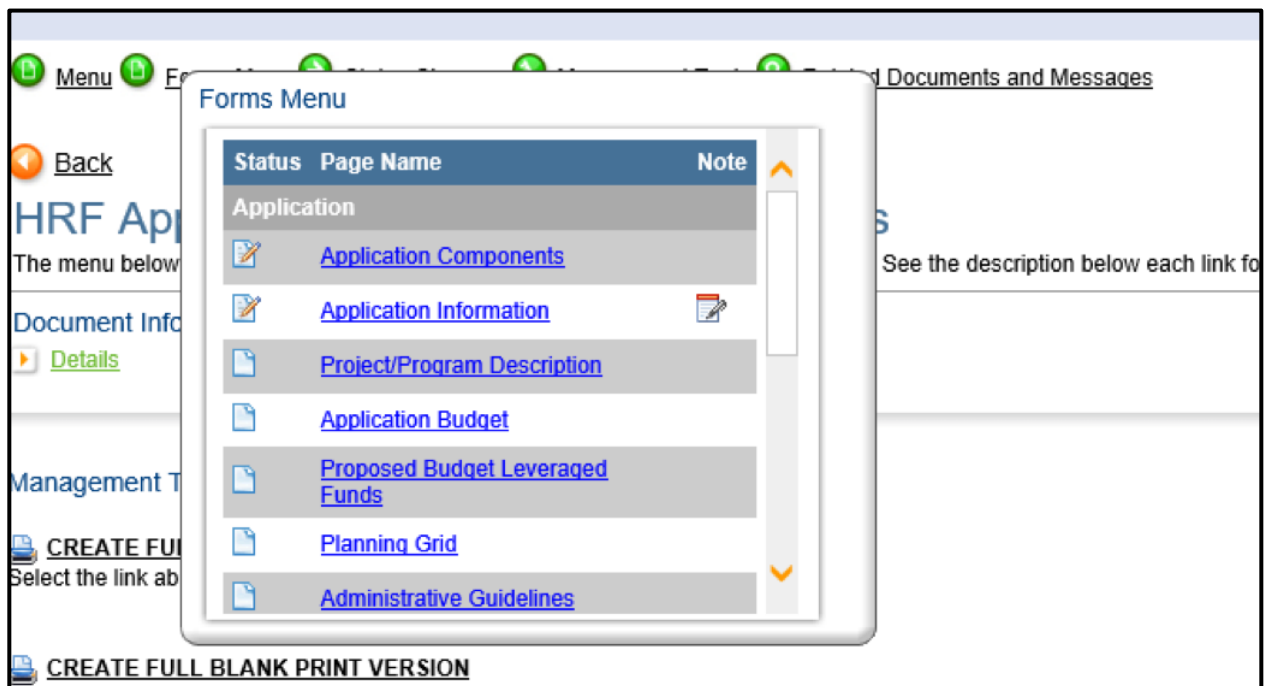
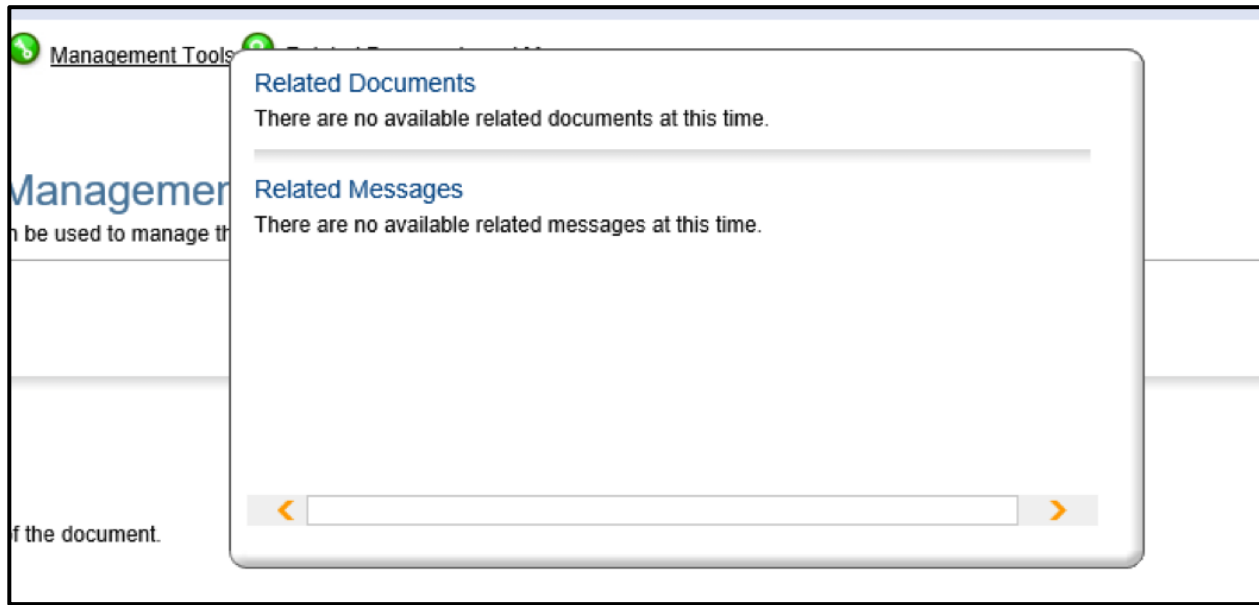**HRF Application User Guide (continued)**

Status Change Menu:
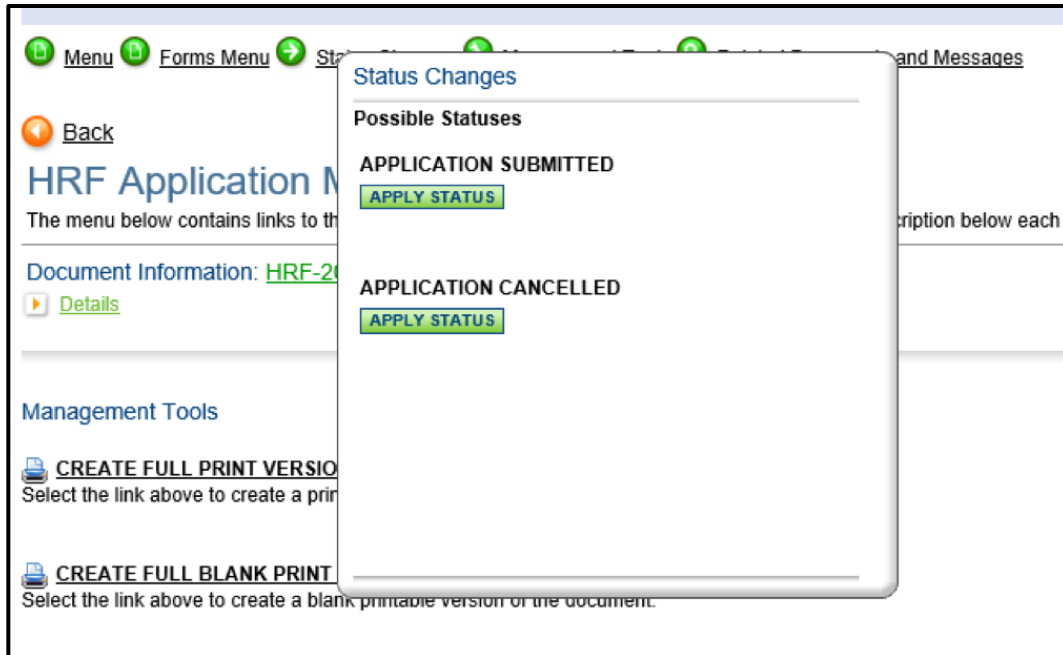
Management Tools:

HRF Application User Guide (continued)

Related Documents and Messages Menu:

These function the exact same as before, except you don't have to go to a new page to select the option you want. It is possible to click the link and get a list of options like it was before, but the remaining steps will assume that you are using the new navigation and the screenshots will reflect this.

NOTE: The menu that appears while hovering only disappears if you move the cursor off the link and the menu. If this happens, just move the cursor over the **Forms Menu, Status Change, Management Tools, or Related Documents and Messages** link (which ever one you wanted to see the options for), and the menu should reappear.

HRF Application User Guide (continued)

Working on the Forms

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Once the *Authorized Official* or *Administrator* agrees to initiate the application, the next page is the HRF Navigation Menu. For now, you want to look at the options for Forms Menu.
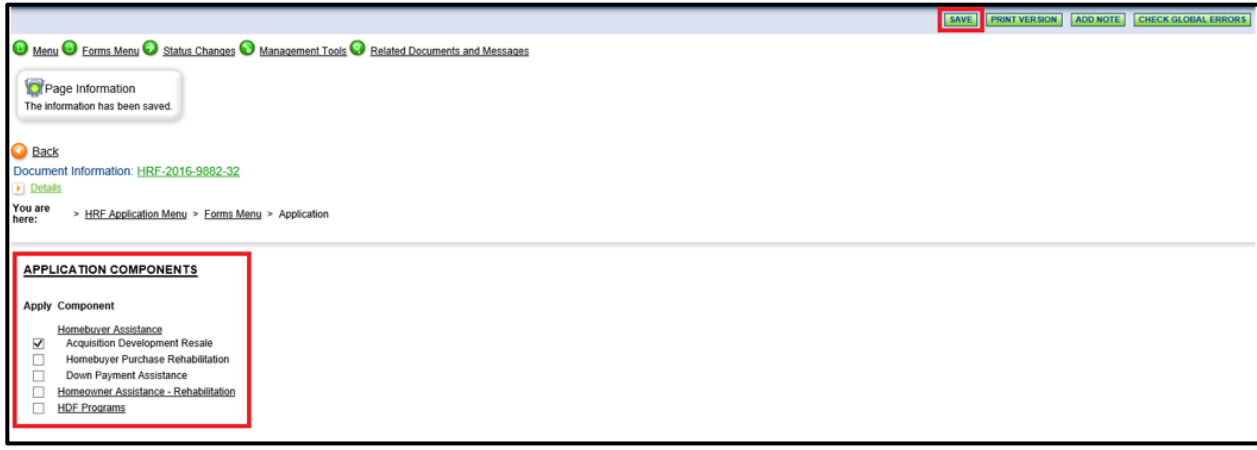

The forms menu contains a list of available forms to be filled out. To begin, you must select the **Application Components** form.

HRF Application User Guide (continued)

On this page, select the checkbox next to the Components that should be applied to your application. Select **SAVE** at the top when you have completed making the selection. This will activate the forms for the selected Components on the Forms menu.


Once the Components have been selected and saved, select the **Back** link to go back to the application's Forms menu

NOTE: **Do not** use the internet browser back button while working on your application, as this may result in an error with your application.

The Forms menu is now populated with the rest of the application forms, including the forms that correlate with the Components that were selected and saved on the **Application Components** page. To continue with the application, you must select the **Application Information** link, the next page in the "Application" section.

HRF Application User Guide (continued)
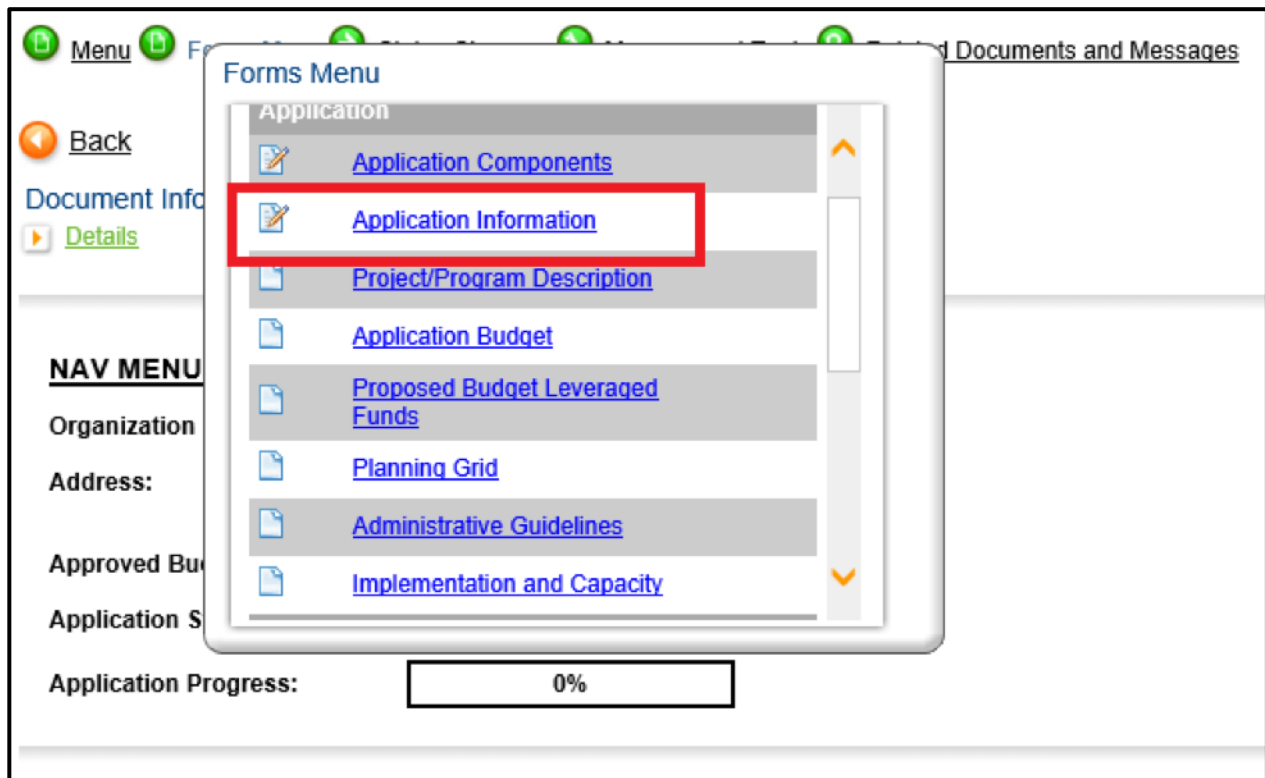
On the **Application Information** page, complete the required fields marked with an *. Select **SAVE** at the top right when you are complete.

Continue to select each page in the "Application" section on the Forms menu, completing all required and relevant fields, then selecting **SAVE** when you are done with each page. Once the "Application" section is complete, you must complete the pages within the Components' section on the Forms menu (e.g. "Homebuyer Assistance", "Homeowner Assistance", and/or "HDF Programs").

HRF Application User Guide (continued)

Changing the Status

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When all pages are complete in the Forms menu, you must submit your application for review (change the status). You can access the submit button for the application one of two ways.

1. In the "Administrative Tools" section of the Forms menu, select the link **Change the Status.**
2. On the HRF Navigation Menu, hover over the **Status Change** link to see the options available.

The first way will prompt you to the Possible Status options on the next page, which will list your options to *submit or cancel* the application. The second way allows you to select the status without changing which page you are on. Either way, select **APPLY STATUS** below the "APPLICATION SUBMITTED" option to submit your application. If you need to cancel your application, then select **APPLY STATUS** below the "APPLICATION CANCELLED" option.

HRF Application User Guide (continued)

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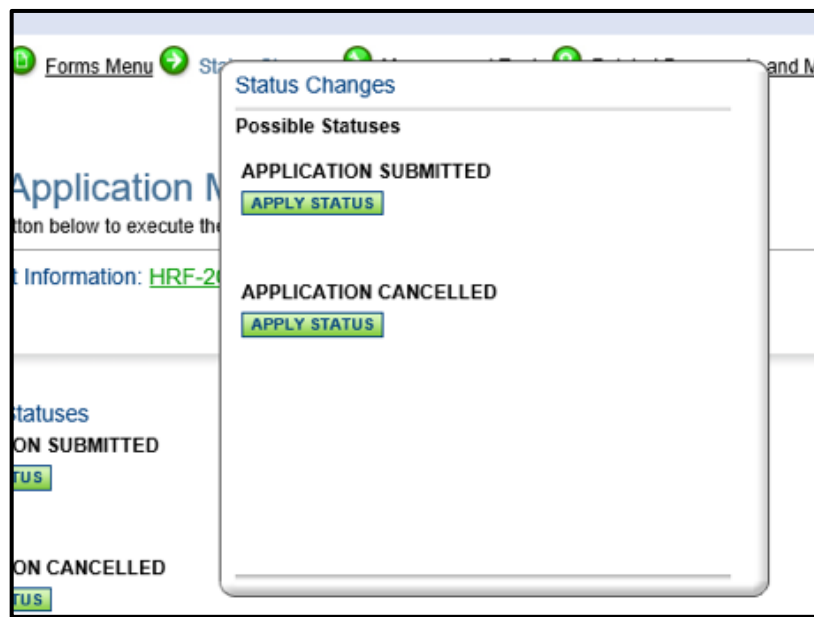
Agreement Page – When you apply the status, you will be prompted to the agreement page. You must select **I AGREE** to complete the submission process. When you are complete, you can check the current status of your application to ensure that the application is in review.

There are two ways to view the current status of your application. You can either:

1. Go to the HRF Navigation Menu by clicking the **Menu** link at the top of the page. Check the "Application Status" row of the page like the one below:

Document Information: HRF-2016-9882-32
▶ Details

NAV MENU

Organization Name:	BJ's Testing Organization
Address:	123 Testing Road Okemos, Michigan, 48864
Approved Budget Grand Total:	
Application Status:	Application in Progress
Application Progress:	0%

2. You can check the "Application Status" column of the details table. If you do not see the table on the HRF Navigation Menu, select the **Details** link, below the Document Information #. The arrow to the left of **Details** should be pointing down.

Document Information: HRF-2016-9882-32
▼ Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	HRF Application	BJ's Testing Organization	Authorized Official	Application in Progress	09/19/2016 - N/A N/A

HRF Application User Guide (continued)

Icons, Errors and Notes

There are different icons that you will notice in the application that have different meanings. For example, an icon can indicate the page:

has not been saved

has been saved

has an error

If there is a page in the application with an error icon to the left of the page name, you must go to that page to resolve the error. There will be an error message at the top of the page to help you resolve the page error.

HRF Application User Guide (continued)

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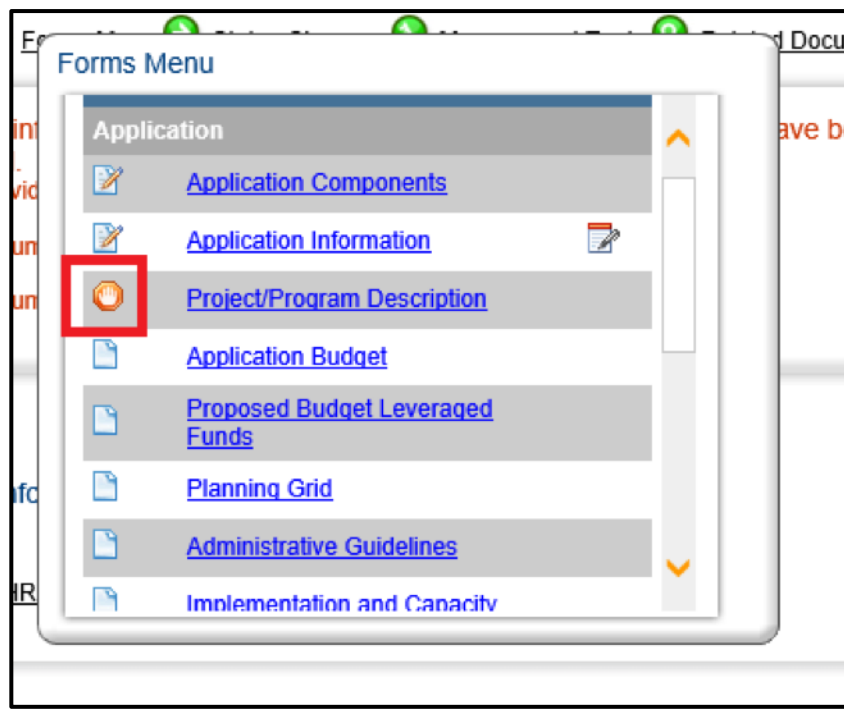
🛑 Your information has been saved and the following Page Error(s) have been found.

• Please choose Yes or No for MSHDA CHDO

• Please supply a main contact

Please certify that all partnership profile expected attachments and all additional items indicated within this application submission are being faxed or mailed in separately (if applicable), and must be received prior to the application being reviewed as a complete submission.

🔙 Back

Document Information: HRF-2016-9882-32
▶ Details

You are here: > HRF Application Menu > Forms Menu > Application

If a note has been added to a page, then the "Note" icon will show on the Forms menu in the "Note" column of the page, to indicate a note has been added to that page.

Forms Menu

Application
📝 Application Components
📝 Application Information   📝
🛑 Project/Program Description
📄 Application Budget
📄 Proposed Budget Leveraged Funds
📄 Planning Grid
📄 Administrative Guidelines
📄 Implementation and Capacity

HRF Application User Guide (continued)

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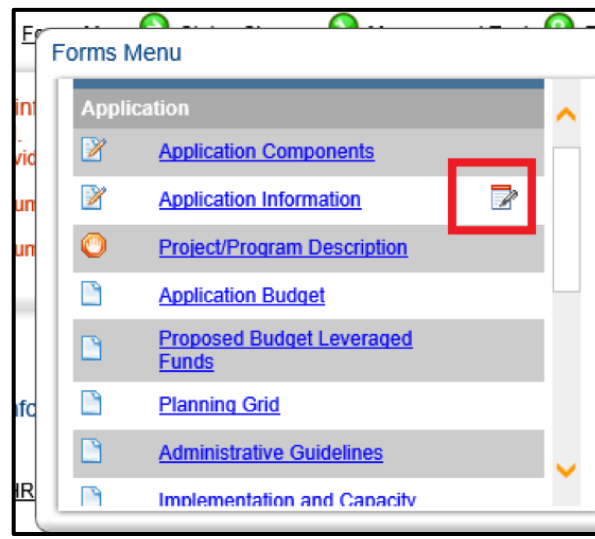
Once the page is opened, select the **Show Notes** link to display the note.

Any role with access to the Application can create a "note". To create a note, select the **ADD NOTE** link at the top right of the page. A small window will pop up titled "Add New Note". Select **Add A NEW NOTE.**

| SAVE | PRINT VERSION | ADD NOTE | CHECK GLOBAL ERRORS |

Drag Here

Notes
There are no available notes at this time.

Message	Date	Action

ADD A NEW NOTE   CLOSE NOTES
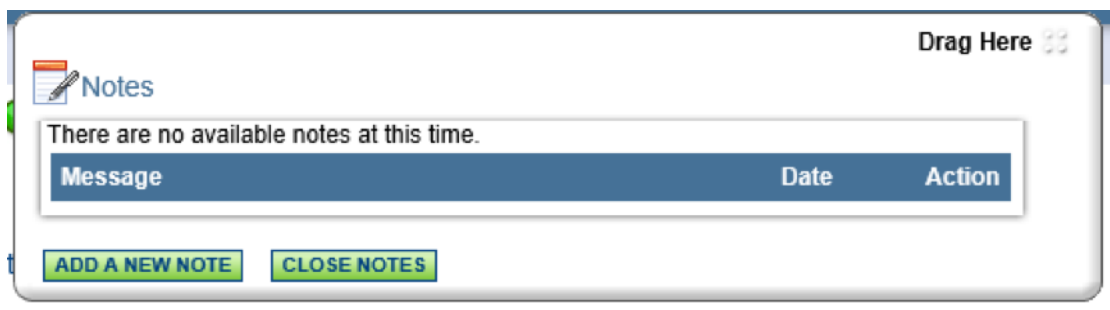
A note can be visible for everyone, or just a specific individual. After you have entered your note, select the "Save" button.

HRF Application User Guide (continued)

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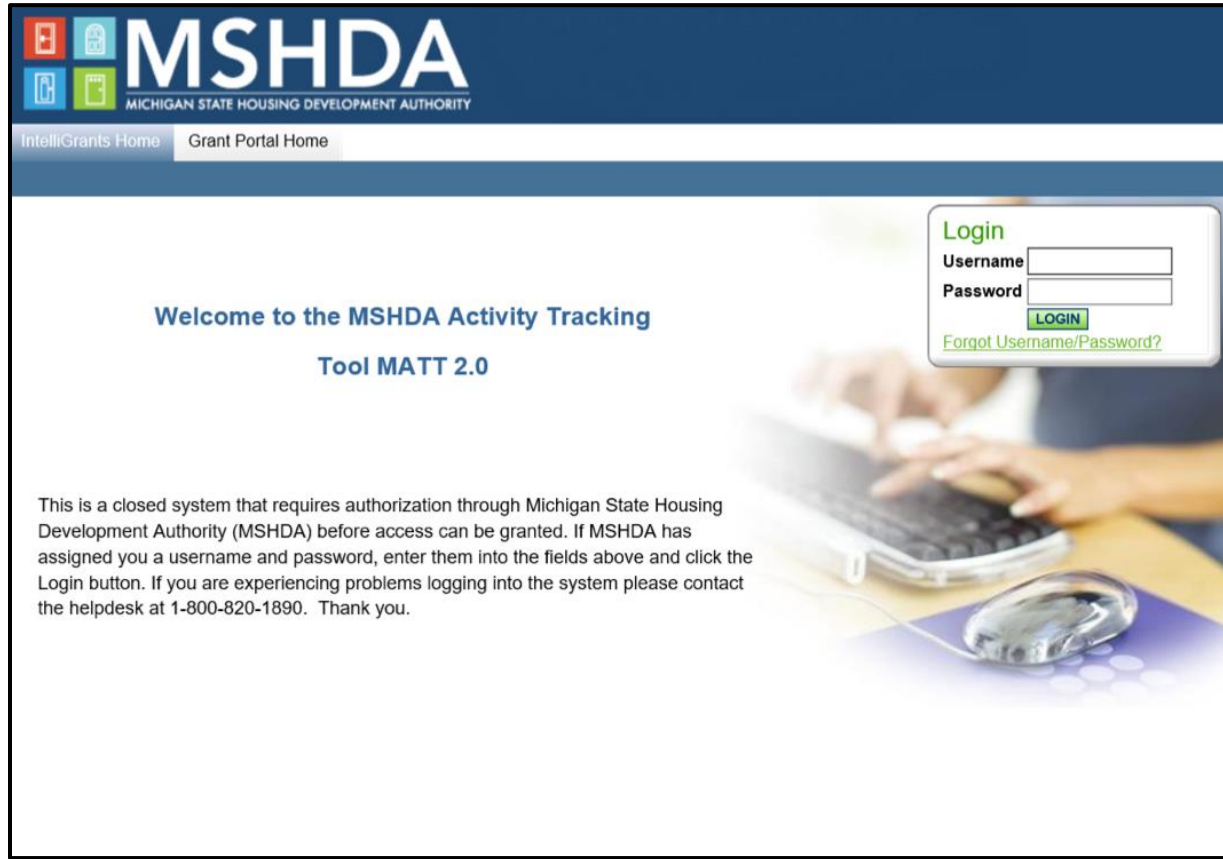
Navigation

In order to return to the navigation menu, from any form or menu, you must select the application's Document Information # link:
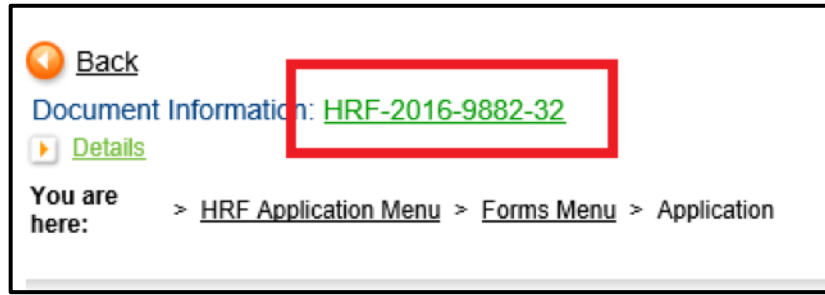
To access an application that has not been completed, or documents that require action from the Authorized Official, they can be found on the home screen, under the "My Tasks" section. Select **OPEN TASKS** and a table will appear with a list of your documents that have tasks that need to be completed. Select the HRF application link (document information #) in the "Name" column of the table. You will be prompted to your HRF Navigation Menu.

HRF Grant User Guide

HRF Grant User Guide (continued)

Accessing the Grant

To access the grant, you must be logged in as a *Specialist*. On the homepage, within the "My Tasks" section, select **OPEN TASKS.** Select the HRF Grant name link, and you will be prompted to the HRF Grant.

Welcome Julie
Specialist
Change Picture

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Viewing/Editing an existing Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant
> Click Here to access MATT V1

Hello Julie, please choose an option below.

View Available Opportunities

You have **2** opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

VIEW OPPORTUNITIES

My Inbox

You have **49** new messages.
Select the **Open Inbox** button below to open your system message inbox.

OPEN INBOX

My Tasks

You have **6** new tasks.
You have **0** tasks that are critical.
Select the **Open Tasks** button below to view your active tasks.

OPEN TASKS
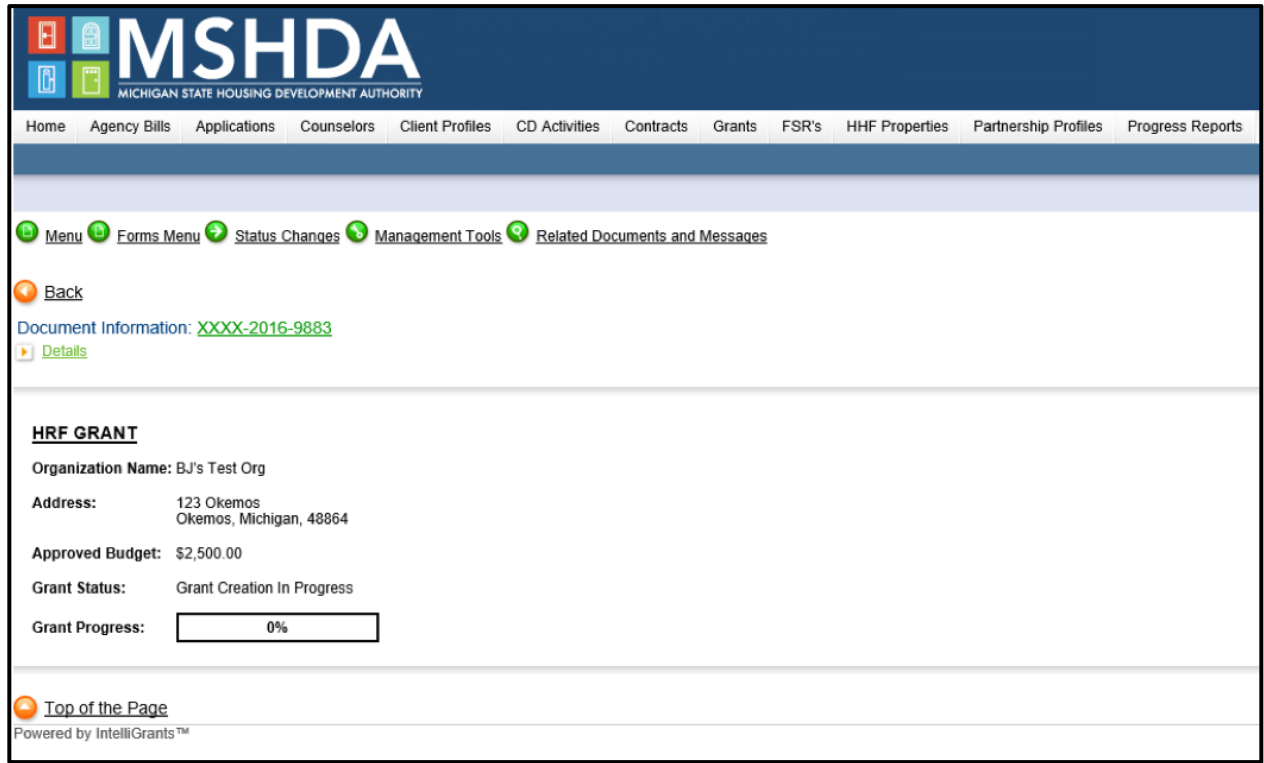
Grant	BJ's Test Org	XXXX-2016-9883	Grant Creation In Progress	5/23/2017
Grant	BJ's Testing Organization	M-2014-9882-XXXX	Grantee Documents Returned	7/31/2014
Grant	BJ's Testing Organization	MSC-2012-9882-HOA	Amendment Request In Progress	8/22/2014

CLOSE TASKS

HRF Grant User Guide (continued)

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You can also access the grant from the HRF Application. To do this, navigate to the HRF Application Menu. Locate and select the "Related Documents and Messages" section. The HRF Grant is listed in there. Select the HRF Grant Name link and you will be prompted to the HRF Grant.

This is the Grant Menu. From here, select the **FORMS MENU** button to start.

HRF Grant User Guide (continued)

In the Form Menu, select a **Form** to get started.

Menu   Forms Menu   Status Changes   Management Tools   Related Documents and Messages

Back

Grant Menu - Forms
Please complete all required forms below.

Document Information: XXXX-2016-9883
Details

Forms

Status	Page Name	Note	Created By	Last Modified By
Grant Information				
	Pre-Disbursement Conditions			
	Program Description			
	Grant Documents			
	IDIS Grant Information			
Budget				
	Grant Budget		Ms. Carolyn Cunningham 5/23/2017 8:58:27 AM	
	Grant Expenditures		Ms. Carolyn Cunningham 5/23/2017 8:58:27 AM	
	Returned Funds			
Amendment				
	Amendment History			
Recaptures				
	Grant Budget Recaptures			
History				
	Closeout Tracking			
	Grant Comments			
Reports				

Accessing the Grant

Grant Budget – on the Forms menu, within the "Budget" section, select the **Grant Budget** link. Certain fields in the grant budget are already populated by values that were entered into forms from the HRF application. All other values in the Requested Funds and Approved Funds for each "Component-Activity" columns must be completed and saved by the Specialist. Complete fields marked with an *. When completed, select the **SAVE** button at the top right.

HRF Grant User Guide (continued)

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SAVE | PRINT VERSION | ADD NOTE | CHECK GLOBAL ERRO

Back

Document Information: HRF-2016--00006
▶ Details

You are here: > Grant Menu > Forms Menu > Budget

GRANT BUDGET

Grant Information

Grant Prefix | M ✓ *

Grant Suffix | ✓ *

Fiscal Year |

Funding Source | ✓

Funding Source:

Grant Date

Begin Date | 📅 *

End Date | 📅 *

Component-Activity	Approved Funds	HRF Units	Non-HRF Units	Leverage Funds	IDIS Number
Homeowner Assistance					
Rehabilitation			3	$1,235	
Sub-Total					
Homebuyer Assistance					
Rehabilitation	$0		5	$520	
New Construction	$0		2	$231	
Down Payment Assistance	$0		2	$123	
Sub-Total					
Residential HDF Assistance					
HDF Activity					
Sub-Total					
Administrative Costs					
Administrative Costs					

HRF Grant User Guide (continued)

Grant Agreement – go back to the Forms menu and select the **Pre-Disbursement Conditions** link. Upload the grant agreement, and check off that it has been signed and complete the date field indicating when it was signed. Fill in any other relevant fields, and when completed, select **SAVE**

HRF Grant User Guide (continued)

Program Description – fill in the program description, and select **SAVE** when you are complete.

Back
Document Information: HRF-2016--00006
Details
You are here: > Grant Menu > Forms Menu

PROGRAM DESCRIPTION

Please describe the program below.
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Changing the Grant Status

After the required forms have been completed, the Specialist must update the status. To do this either:

1. Select **Status Changes** from the top.

Possible Statuses
MANAGER REVIEW REQUIRED
APPLY STATUS

GRANT CANCELLED
APPLY STATUS

HRF Grant User Guide (continued)

Menu ➔ Forms Menu ➔ Status Changes ➔ Management Tools ➔ Related Documents and Messages

Back

Document Information: M-2016-9883
▸ Details

HRF GRANT

Organization Name: BJ's Test Org

Address: 123 Okemos
Okemos, Michigan, 48864

Approved Budget: $2,500.00

Grant Status: Grant Creation In Progress

Grant Progress: 0%

Top of the Page
Powered by IntelliGrants™

Select to **Apply**

From the Forms menu directly, select the **Change the Status** link in the "Administrative Tools" section.

Administrative Tools

Change the Status

Status History

Add/Edit People

Related Items

Select the **APPLY STATUS** button below "MANAGER REVIEWED REQUIRED" to push the HRF Grant to the next status option. Select the **APPLY STATUS** button below "GRANT CANCELLED" to cancel the HRF Grant.

HRF Grant User Guide (continued)

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Possible Statuses
MANAGER REVIEW REQUIRED
[APPLY STATUS]

GRANT CANCELLED
[APPLY STATUS]

If the grant is ready to be pushed to the next status, then select the **I AGREE** button on the Agreement page.

Next, the *Manager* must review the Grant Budget and Contract Agreement, but does not save any forms. When the review is complete, the *Manager* must approve the grant by pushing the HRF Grant to the "GRANT FUNDING REQUIRED" status, or pushing the grant back to the Specialist for modifications by changing the HRF Grant to the "GRANT CREATION IN PROCESS" status.

Possible Statuses
GRANT FUNDING REQUIRED
[APPLY STATUS]

GRANT CREATION IN PROGRESS
[MODIFICATIONS REQUIRED]

The *Manager* must select **I AGREE** on the Agreement page to complete the status change.

HRF Grant User Guide (continued)

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Funding the Grant

In the "Grant Funding Required" status, the *Financial Analyst* must select a funding source and enter a funding amount on the **Grant Budget** form in the Forms menu (funding amount is based on the *Specialist's* recommended funding amount but it is not required that it match this amount).

HRF Grant User Guide (continued)

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Add/Edit People to the Grant

Before the grant is executed, an *Authorized Signer* must be added to the document. To add an *Authorized Signer* to the document the *Specialist* must go to the Grant Menu and select **Management Tools** at the top.
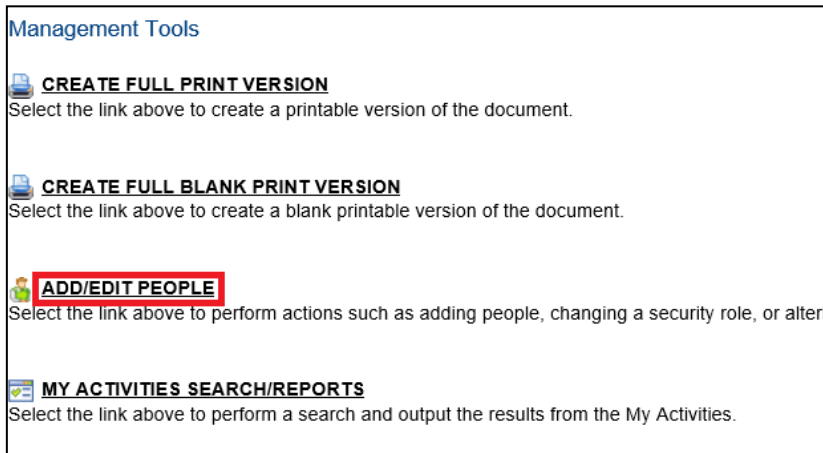
Then select the **Add/Edit People** link on the Management Tools page.

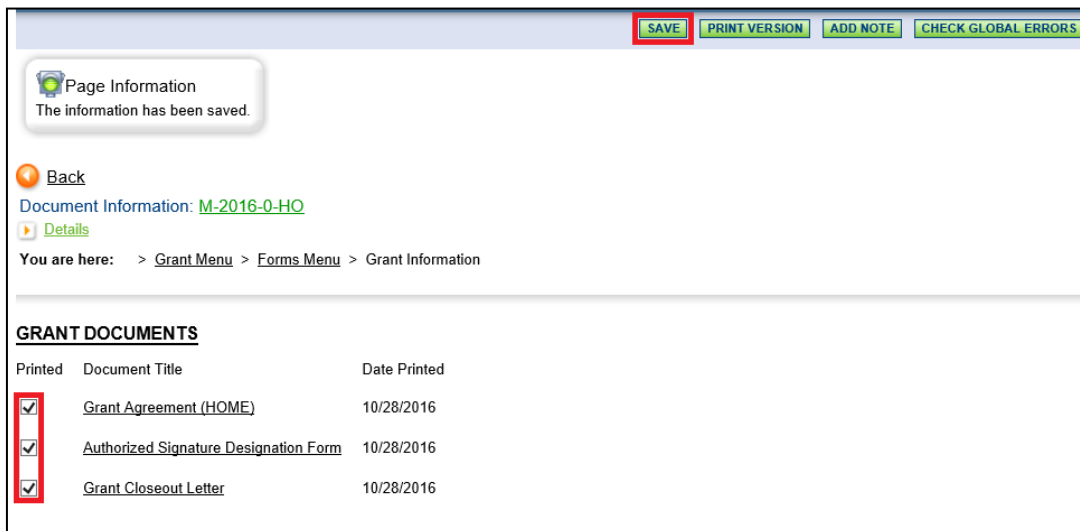**HRF Grant User Guide (continued)**

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On the next page a list will display the people who can be added to or removed from the document. Find the *Authorized Signer* and select the checkbox next to the name in the left column. Once the *Authorized Signer* has been added, select the **Save** button at the top right.

Executing the Grant

The *Financial Analyst* must update the status of the HRF Grant to "GRANT LEGAL REVIEW REQUIRED" for the HRF Grant to be legally reviewed.

The *Legal* role must review the HRF Grant and when review is complete, push the HRF Grant to the "GRANT LEGAL REVIEW COMPLETE" status. The status will automatically reach the "GRANT DOCUMENT PRINTING REQUIRED" status.

Admin Support must go to the Forms menu of the HRF Grant and select the **Grant Document** link and upload the Grant Documents, then print them. When completed, select the check box next to the printed document. Select **SAVE** at the top right. The date will appear in the Date Printed column on the page.

HRF Grant User Guide (continued)

Next, *Admin Support* must push the HRF Grant to the "GRANT DOCUMENTS PRINTED" status. *Admin Support* must agree to complete the status change.

Possible Statuses
GRANT DOCUMENTS PRINTED
APPLY STATUS

The HRF Grant will automatically update to the "GRANT CONDITIONS REQUIRED" status.
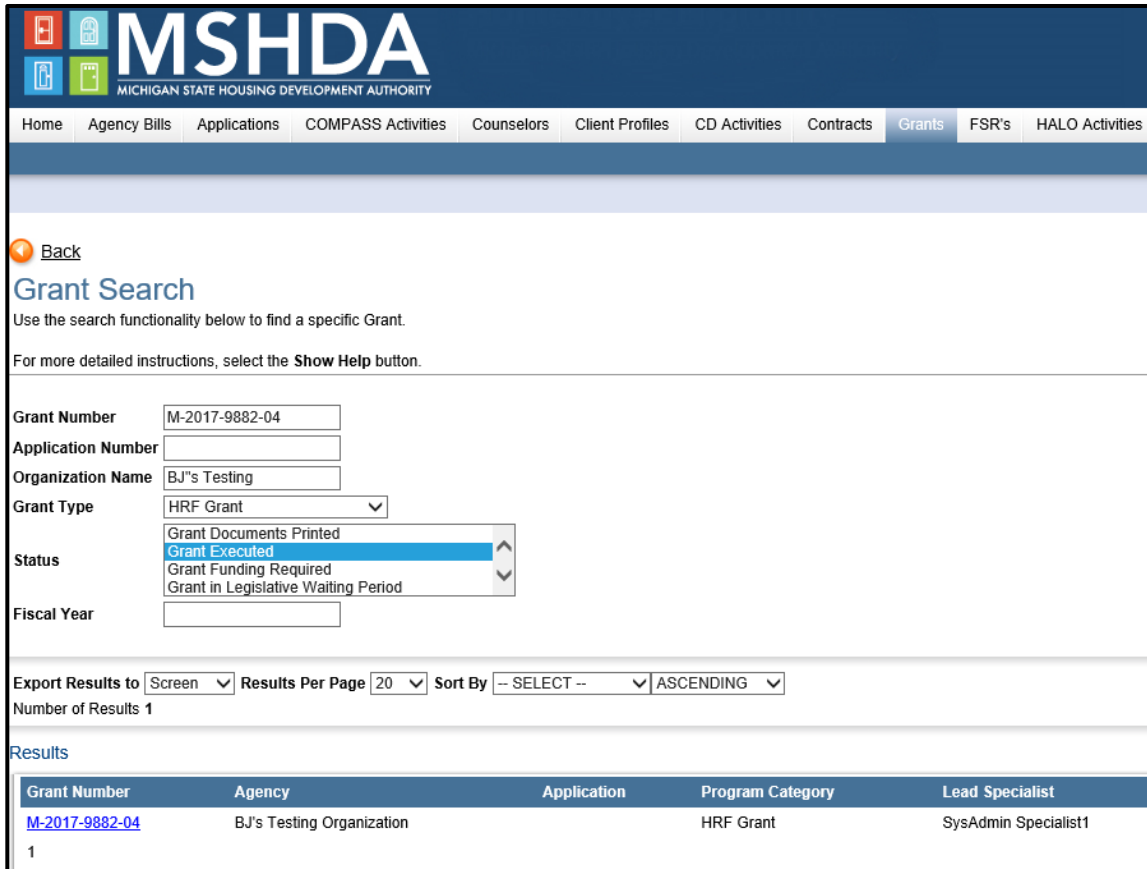
Next, the *Specialist* must select the **Pre-Disbursement** link on the forms menu and indicate that the grant documents were received by selecting the checkbox next to the document in the "Satisfied" column, then selecting **Save**. Then the *Specialist* must update the HRF Grant to the "GRANTEE DOCUMENTS RETURNED" status.

Once an *Authorized Signer* has been added to the HRF Grant, and when the HRF Grant is ready to be executed, the *Specialist* must change the HRF Grant to the "GRANT EXECUTED" status.   For instructions on how to add a person to the document, refer to the section 5: Add/ Edit People to the Grant on this user guide.

HRF Grant User Guide (continued)

Begin Grant Amendment

The grant you are looking to amend must have the status of "Grant Executed". To access the grant, you must be logged in as a *Specialist, Administrator, Authorized Official or Authorized Signer*. Click on the Grants tab at the top of the page and search for the grant. Click on the Grant Number from the Results table to access the Grant.

HRF Grant User Guide (continued)

Hover over 'Status Changes' and Apply Status to 'AMENDMENT REQUEST IN PROGRESS'. If you would like to include any notes about the status chance, do so and click 'I AGREE'. (NOTE: An amendment cannot be made to the grant until all FSRs are approved)

Hover over the forms Menu and select 'Grant/Budget Amendment Request' under the Amendment Sub-section.

HRF Grant User Guide (continued)

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Fill out the 'Grant/Budget Amendment Request' page by clicking on the checkboxes for the changes to be made. The pertinent fields will immediately display to be filled out.

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**.

• Additonal 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. Click here to change the document status.

• 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.

Amendment Number

☐ Change Grant Term
☐ Change Program Description
☐ Change Budget
☐ Change Special Condition
☐ Change Grant Number/ Funding Source Year

Describe the reason for the amendment:

                                                    0 of 750

After the 'Grant/Budget Amendment Request' page is completed, the Amendment needs to be reviewed and approved. Use the same Status Push functionality as described in earlier steps of this guide to push the Amendment Status's as ordered below.

a. Two roles can push the status.
   i. Authorized Signer > Amendment Request Submitted (Specialist Responsibility)
   ii. Specialist > Amendment Manager Review Required

HRF Grant User Guide (continued)

The remaining process flow for Status Changes and the Roles that can push the status forward are:

1. Amendment Manager Review Required (Manager Responsibility)
2. Amendment Financial Analyst Review Required (Financial Analyst Responsibility)
3. Amendment Review Complete (auto-advances to Amendment Printing Required)
4. Amendment Printing Required (Admin Support Responsibility)
5. Amendment Printing Complete (Auto-advances to Amendment IDIS Entry Required if Federal Funded. If not Federal Funded Auto-advances to Amendment Conditions Required)
6. Amendment IDIS Entry Required (Federal Liaison Responsibility)
7. Amendment Conditions Required (Specialist Responsibility)
8. Amendment Grantee Documents Returned (Specialist Responsibility)
9. Grant Executed (Amendment is Complete)

When any modifications are required, the process flow starts over back at step 1

FSR User Guide

FSR User Guide (continued)

Initiating the FSR
The **Authorized Official** can initiate a FSR. Once logged in, navigate to **My Tasks**, and then click **OPEN TASKS.**
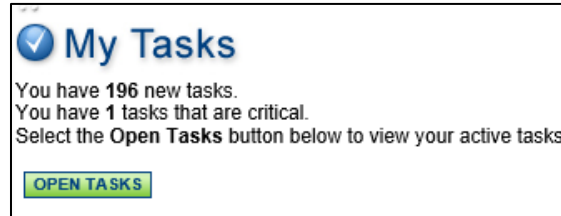
Find your grant in the list, select it by the blue link under the name category.

That will take you to the **grant menu.** Once in the grant menu select the **Forms Menu** at the top, scroll down until you find the **Financial Status Reports**, and select that.

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FSR User Guide (continued)

To initialize a new FSR, At the top of the Results table you can select **Initialize FSR**
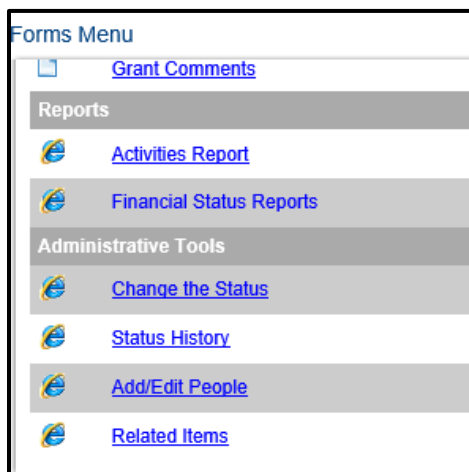
FSR Number

Initialize FSR

Filling out the FSR

Forms Menu

Status	Page Name	Note
📝	Financial Status Report/Payment Request	
📄	Expense Detail	
📄	OPAL FSR Comments	
📄	HUD Draws	

Financial Status Report/Payment Request

a. Displays a summary of the current Financial Status Report, which shows, among other things a breakdown, by budget category, of all expenses reported to date, the balance remaining for the grant budget, and the total payment requested for the current period. Individuals expenses are reported on the expense detail form and then used in the calculations. *(see image on the next page)*

FSR User Guide (continued)

Grant Information		Report Information	
Award Amount:	$335,000	Date Submitted:	01/08/2018
% of Grant Paid Out:	1%	Request #:	1
Term:	12/12/2017 to 03/10/2018	Final Report:	Yes ○ No ○ *
Max Deviation:		Status:	FSR in Progress
Current Deviation:		Current Report Period:	[ ]📅* to [ ]📅*
Payee:		Check Date:	12/21/2016
Environ. Release Date		Check #:	264250
		Check Amount:	$6,126

Comments to the Review Team from the Grantee:

```
cxaFCfda
```
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Budget Categories	Approved Budget	Previous Expenditures	This Period Expenditures	Total Expenditures	Current Balance
Homeowner Assistance/Rehab	$100,000	$0	$0	$0	$100,000
Homebuyer Assistance/Rehab	$100,000	$0	$0	$0	$100,000
Homebuyer Assistance/New Construction	$50,000	$0	$0	$0	$50,000
Homebuyer Assistance/DPA	$35,000	$0	$0	$0	$35,000
HDF Activities	$35,000	$0	$0	$0	$35,000
Administrative Costs / Administrative Costs	$15,000	$0	$0	$0	$15,000
TOTAL	$335,000	$0	$0	$0	$335,000

Requested Advance	$4,500
Advances and Reimbursements Previously Requested	0
Cash on hand	0
Requested Reimbursement	$0
TOTAL PAYMENT REQUESTED	$4,500

FSR User Guide (continued)

Expense Detail

    a. Use the form to report expenditures incurred during this report period.

    b. For each expense item, enter in all pertinent information and Save.

    c. When you are finished, click on the Expense Summary tab to view your Financial Status Report.

Expense Detail

Add an Expense Item

Activity	☑ *
Developer Item Fee?	☐
Invoice Date	📅 *
Description	(0 of 1000) *
Amount of Invoice	*
Amount billed to MSHDA	*

Expenses incurred during the current report period

Delete?	Budget Category	Item	Activity	Developer Fee Item?	Invoice Date	Description	Amount of Invoice	Amount Billed to MSHDA
☐				☐				

TOTAL: $0

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FSR User Guide (continued)

Opal FSR Comments

    a. Fill in any comments that are relevant to FSR

HUD Draws

    a. Shows HUD draws for the Financial Status Report. Draws are created once the report is approved, where applicable.
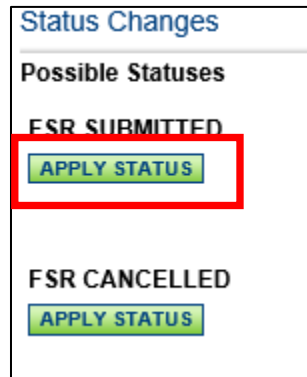
Pushing FSR Status

After completing all the forms, the **System Administrator or Authorized Signer** has permissions to push the FSR to the next step. Once signed in, navigate to **My Tasks**, and then **Open Tasks**. Click on the FSR Name you are looking to push.

Info	Document Type	Organization	Name	Current Status
	FSR	BJ's Testing Organization	M-2017-9882 FSR #1	FSR in Progress

Click **Status Changes** at the top and then select **FSR Submitted** *(see image on next page)*

FSR User Guide (continued)
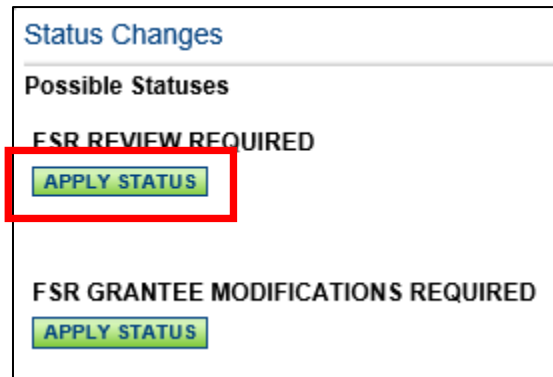

Fill in any necessary notes to include and click the **I agree** button on the **Agreement** page.

The **Specialist** is needed to push the status from **FSR Submitted** to **FSR Review Required**. Once user is logged in, navigate to the FSR menu through **My Tasks** pane and finding your FSR.

Once you get to your FSR menu, select Status changes and click **FSR Review Required**

The **Manager** is needed to push the status from **FRS Review Required** to **FSR Director Review Required.** Navigate to the FSR menu via the same route from step D above and push the status to **FSR Director Review Required.** *(see image on next page)*

FSR User Guide (continued)

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Status Changes

Possible Statuses

~~FSR DIRECTOR REVIEW REQUIRED~~

[APPLY STATUS]

FSR MODIFICATIONS REQUIRED

[APPLY STATUS]

The **Director** is needed to push the status from **FSR Director Review Required** to **FSR Approved,** Follow the same steps as listed in step D to push the status.

Status Changes

Possible Statuses

~~FSR APPROVED~~

[APPLY STATUS]

FSR MODIFICATIONS REQUIRED

[APPLY STATUS]

Once the FSR is in FSR Approved it will automatically move into the **Payment Initiated** status. Overnight, a nightly job will pick up the data and insert it into a Check Request file. MSHDA Finance then takes over and will upload an acknowledgement file to the site. This, too, will be automatically processed and when complete the FSR will move into **Payment Complete** status, indicating that payment for the FSR has been processed, or **Record HUD Draws** status, indicating that HUD draw information still must be recorded before FSR Completion.