IGX Grants Management System
Payment Request & Financial Status Report

PURPOSE: This process guide will walk you through how to request a payment through the IGX Grants Management System by submitting a Financial Status Report (FSR).

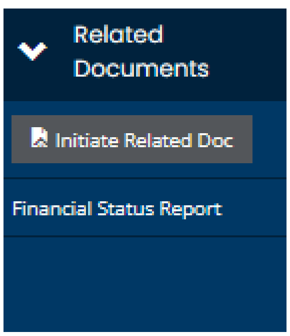
- Click here for budgets with **no** investment areas.
- Click here for budgets **with** investment areas.

Log in to the IGX Grants Management System.

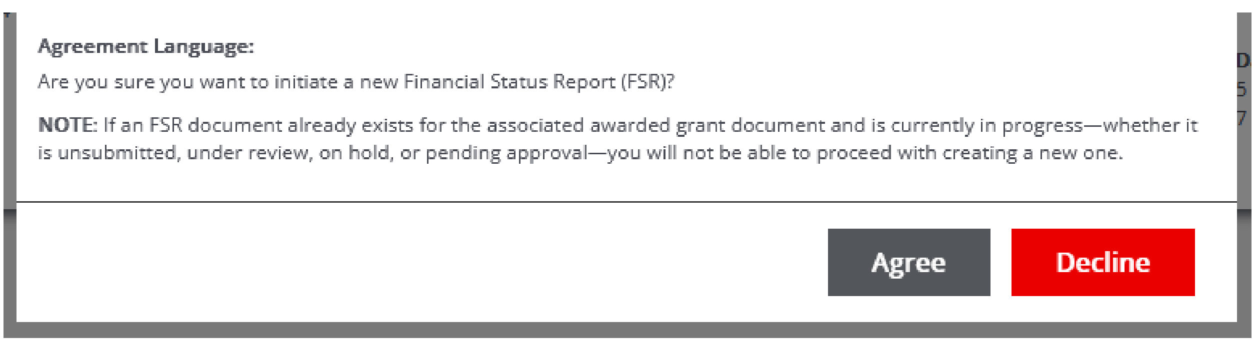
Note: Only an Agency Administrator, Agency Program Administrator, or Agency Financial Officer may initiate and submit an FSR.

Budgets With NO Investment Areas

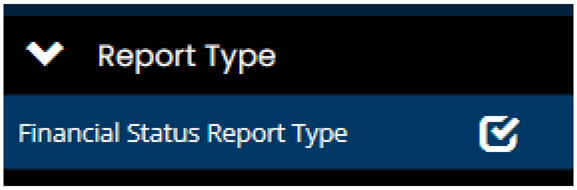
STEP 1: On the left panel, scroll down to "Related Documents" at the bottom of the panel. Click on "Initiate Related Document"



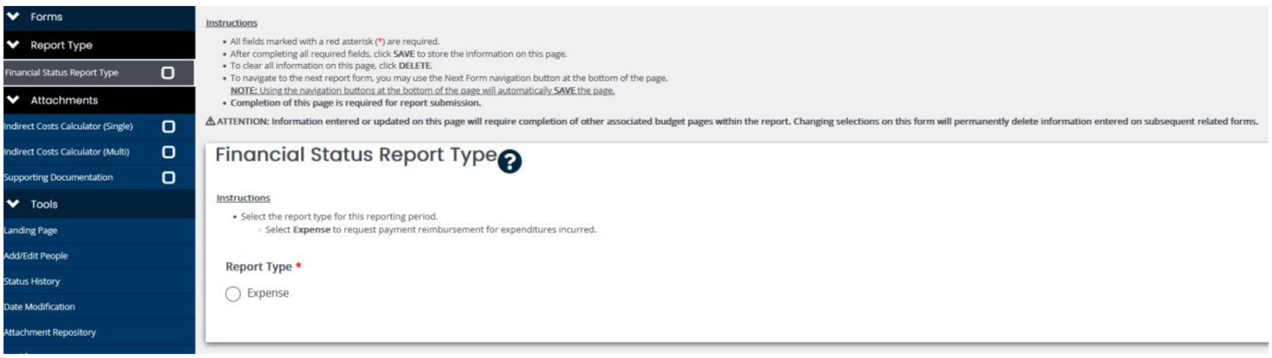
STEP 2: You'll see a pop up asking if you want to initiate a Financial Status Report (FSR). Click "Agree."



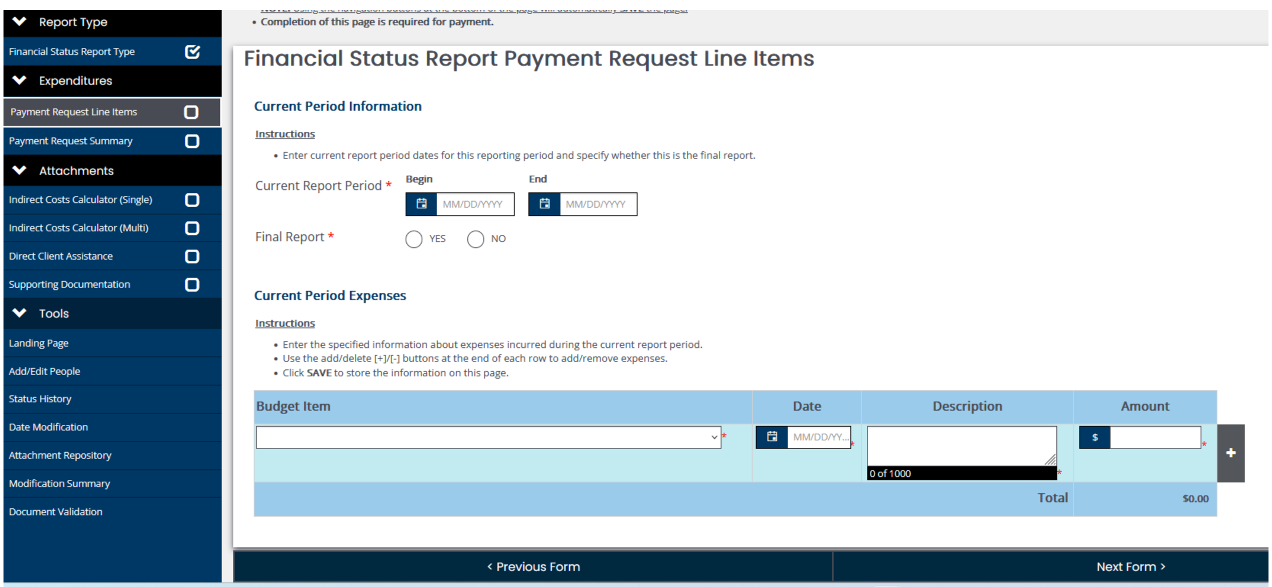
STEP 3: In the left panel, under "Report Type," select the "Financial Status Report" form.



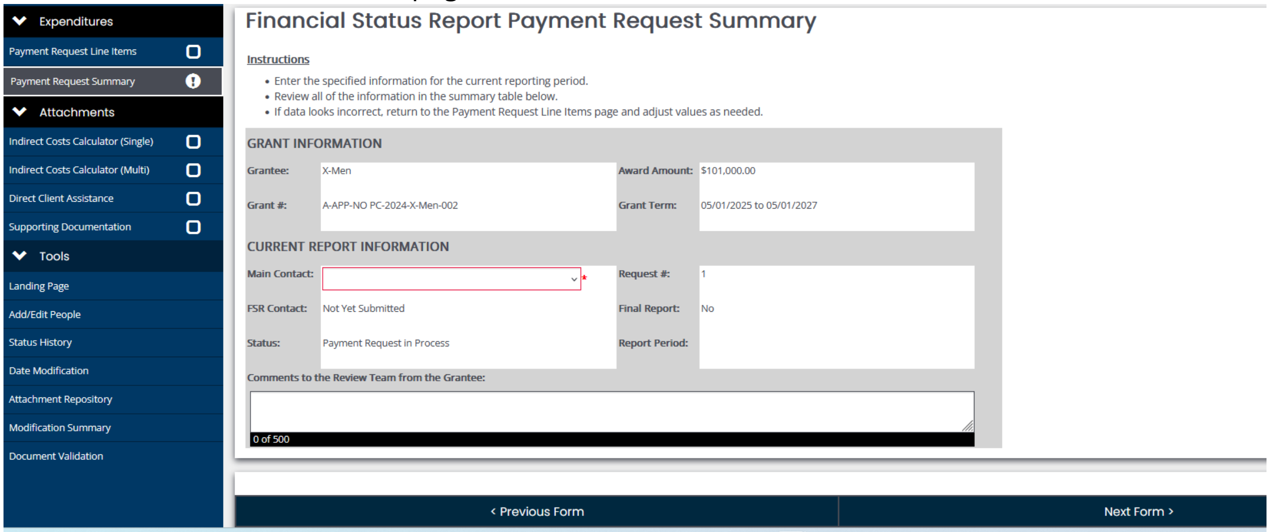
STEP 4: In the Financial Status Report Type form, select Expense. Click "Save" in the upper right corner of the form. Scroll to the bottom of the page and click "Next Form."



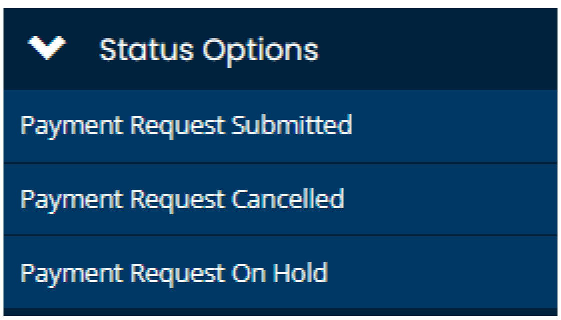
STEP 5: This will take you to the "Payment Request Line Items" form. Complete the form. Click "Save" in the upper right corner of the form. Scroll to the bottom of the page and click "Next Form."



STEP 6: This will take you to the “Payment Request Summary” form. Review the form to ensure the information is correct and select the “Main Contact.” Click “Save” in the upper right corner of the form. Scroll to the bottom of the page and click “Next Form.”



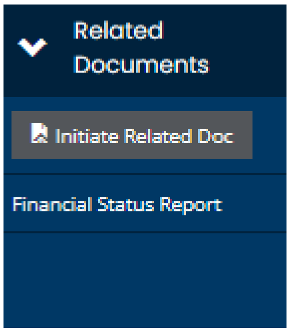
STEP 7: In the left panel, scroll to the “Status Options” section. Click “Payment Request Submitted.”



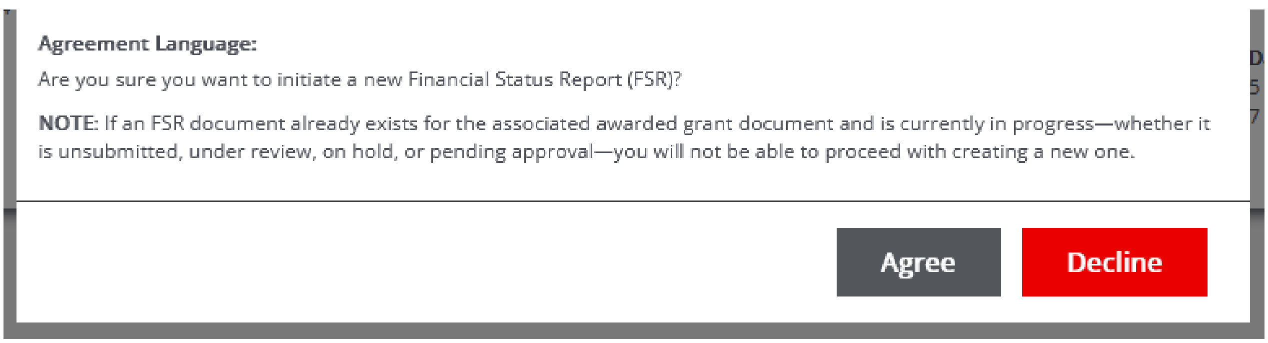
Budgets WITH Investment Areas

***NOTE**: Only one Investment Area or Purpose Area can be selected for an FSR. Multiple Investment Areas or Purpose Areas will require submission of multiple FSRs.*

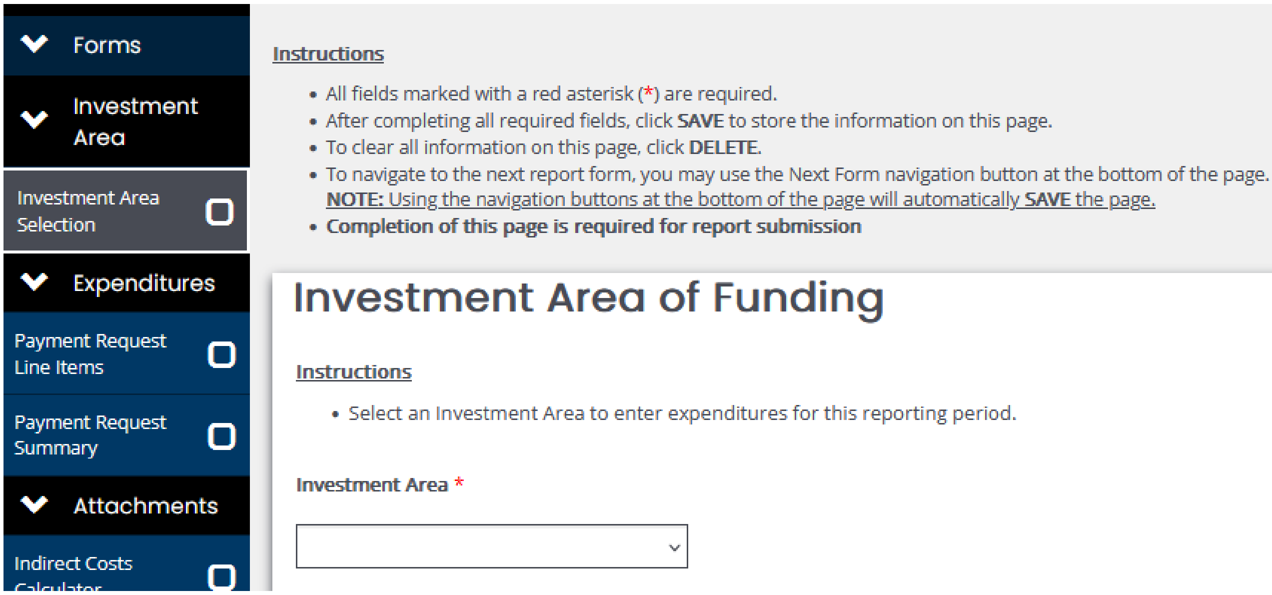
STEP 1: On the left panel, scroll down to "Related Documents" at the bottom of the panel. Click on "Initiate Related Document"



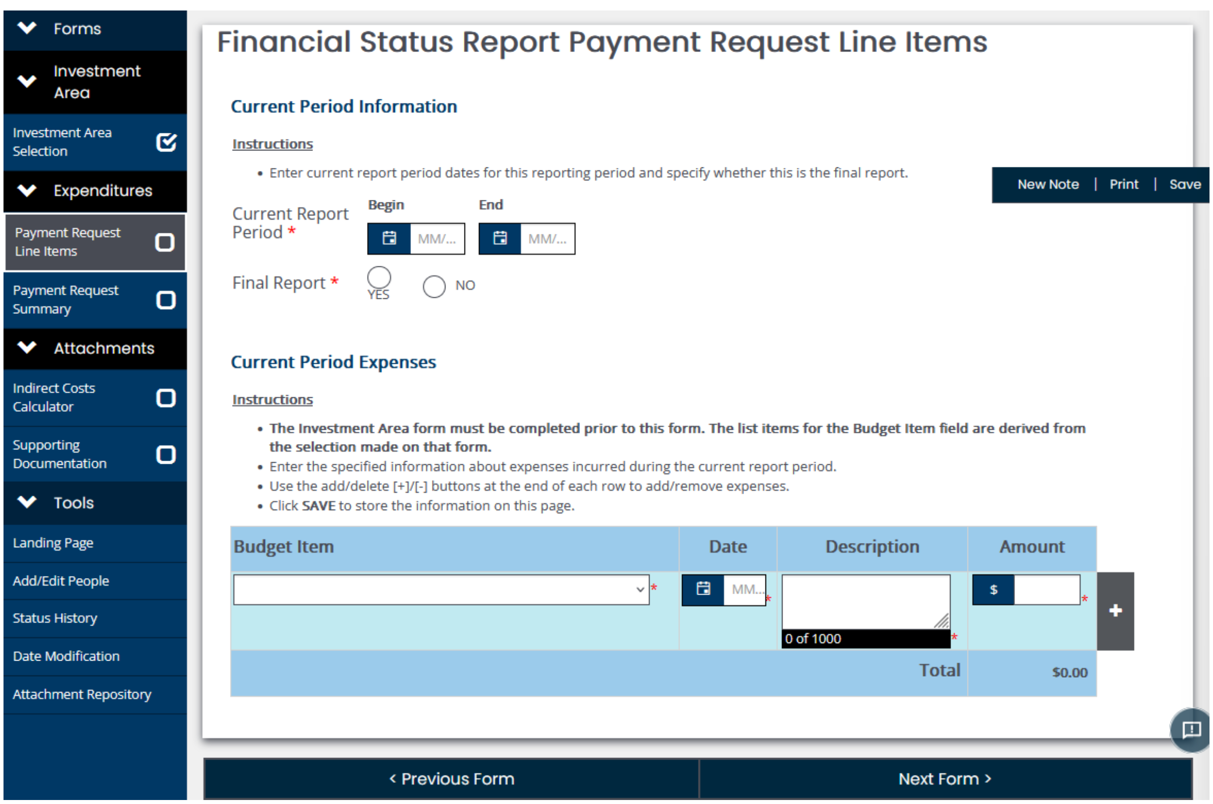
STEP 2: You'll see a pop up asking if you want to initiate a Financial Status Report (FSR). Click "Agree."



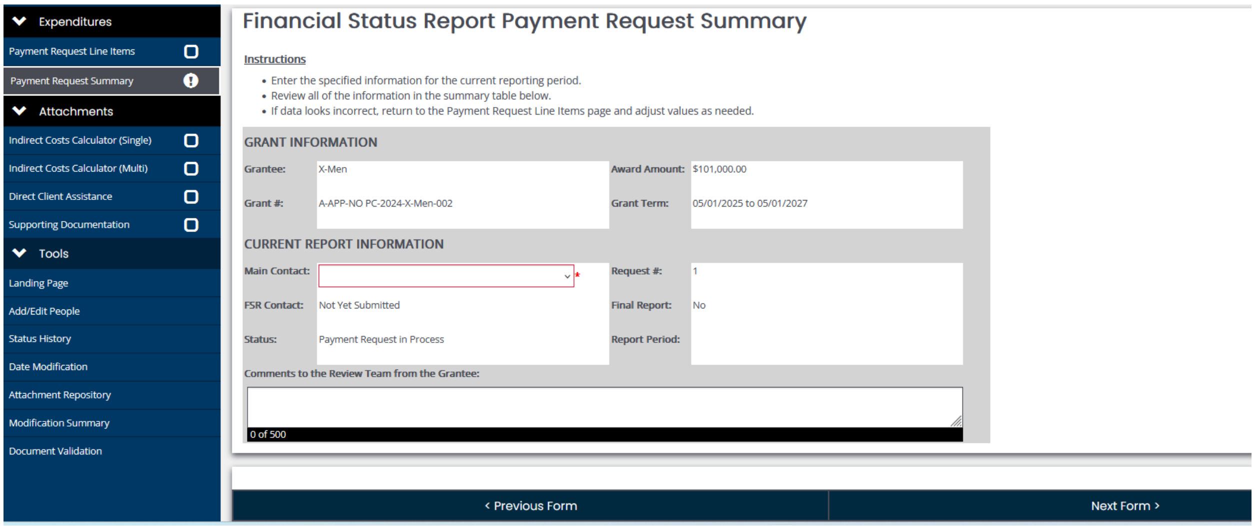
STEP 3: In the left panel, under "Investment Area," click the "Investment Area Selection" form. Select the "Investment Area." Click "Save" in the upper right corner of the form. Scroll to the bottom of the page and click "Next Form."



STEP 4: This will take you to the "Payment Request Line Items" form. Complete the form. Click "Save" in the upper right corner of the form. Scroll to the bottom of the page and click "Next Form."



<u>STEP 5</u>: This will take you to the "Payment Request Summary" form. Review the form to ensure the information is correct and select the "Main Contact." Click "Save" in the upper right corner of the form. Scroll to the bottom of the page and click "Next Form."



<u>STEP 6</u>: In the left panel, scroll to the "Status Options" section. Click "Payment Request Submitted."