



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).

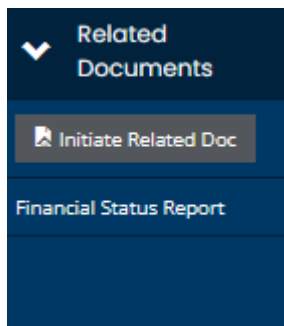
- [Click here for budgets with **no** investment areas.](#)
- [Click here for budgets **with** investment areas.](#)

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.”

Agreement Language:

Are you sure you want to initiate a new Financial Status Report (FSR)?

NOTE: If an FSR document already exists for the associated awarded grant document and is currently in progress—whether it is unsubmitted, under review, on hold, or pending approval—you will not be able to proceed with creating a new one.

Agree

Decline

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

Payment Request & Financial Status Report



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.”

Payment Request & Financial Status Report

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.”

The screenshot shows the 'Financial Status Report Payment Request Summary' form. On the left is a sidebar with a 'Tools' section containing links like 'Landing Page', 'Add/Edit People', 'Status History', 'Date Modification', 'Attachment Repository', 'Modification Summary', and 'Document Validation'. The main form area has a title bar and an 'Instructions' section. Below this is the 'GRANT INFORMATION' section with fields for Grantee (X-Men), Award Amount (\$101,000.00), Grant # (A-APP-NO PC-2024-X-Men-002), and Grant Term (05/01/2025 to 05/01/2027). The 'CURRENT REPORT INFORMATION' section includes Main Contact (a dropdown menu), Request # (1), PSR Contact (Not Yet Submitted), Final Report (No), Status (Payment Request in Process), and Report Period. At the bottom of the form is a 'Comments to the Review Team from the Grantee' text area. Navigation buttons at the bottom are '< Previous Form' and 'Next Form >'.

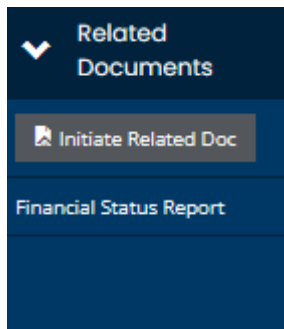
STEP 7: In the left panel, scroll to the “Status Options” section. Click “Payment Request Submitted.”

The screenshot shows a 'Status Options' menu with a dropdown arrow icon. The menu contains three options: 'Payment Request Submitted', 'Payment Request Cancelled', and 'Payment Request On Hold'.

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.”

Agreement Language:

Are you sure you want to initiate a new Financial Status Report (FSR)?

NOTE: If an FSR document already exists for the associated awarded grant document and is currently in progress—whether it is unsubmitted, under review, on hold, or pending approval—you will not be able to proceed with creating a new one.

Agree

Decline

Payment Request & Financial Status Report

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.”

Instructions

- All fields marked with a red asterisk (*) are required.
- After completing all required fields, click **SAVE** to store the information on this page.
- To clear all information on this page, click **DELETE**.
- To navigate to the next report form, you may use the Next Form navigation button at the bottom of the page.

NOTE: Using the navigation buttons at the bottom of the page will automatically **SAVE** the page.

- **Completion of this page is required for report submission**

Investment Area of Funding

Instructions

- Select an Investment Area to enter expenditures for this reporting period.

Investment Area *

[Dropdown menu]

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.”

Financial Status Report Payment Request Line Items

Current Period Information

Instructions

- Enter current report period dates for this reporting period and specify whether this is the final report.

Current Report Period *

Begin: [Date Picker] End: [Date Picker]

Final Report *

☐ YES ☐ NO

Current Period Expenses

Instructions

- The Investment Area form must be completed prior to this form. The list items for the Budget Item field are derived from the selection made on that form.
- Enter the specified information about expenses incurred during the current report period.
- Use the add/delete [+] [-] buttons at the end of each row to add/remove expenses.
- Click **SAVE** to store the information on this page.

Budget Item	Date	Description	Amount
[Dropdown]	[Date Picker]	[Text Input]	[Text Input] \$
			0 of 1000
Total			\$0.00

< Previous Form Next Form >

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STEP 5: 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.”

The screenshot shows the 'Financial Status Report Payment Request Summary' form. On the left is a dark blue sidebar with a menu. The main content area is white with a light gray header. The form includes sections for 'GRANT INFORMATION' and 'CURRENT REPORT INFORMATION'. At the bottom, there are navigation buttons: '< Previous Form' and 'Next Form >'. A comment box at the bottom of the form shows '0 of 500' characters.

Financial Status Report Payment Request Summary

Instructions

- Enter the specified information for the current reporting period.
- Review all of the information in the summary table below.
- If data looks incorrect, return to the Payment Request Line Items page and adjust values as needed.

GRANT INFORMATION

Grantee:	X-Men	Award Amount:	\$101,000.00
Grant #:	A-APP-NO PC-2024-X-Men-002	Grant Term:	05/01/2025 to 05/01/2027

CURRENT REPORT INFORMATION

Main Contact:	<input type="text" value="X-Men"/>	Request #:	1
FSR Contact:	Not Yet Submitted	Final Report:	No
Status:	Payment Request In Process	Report Period:	

Comments to the Review Team from the Grantee:

< Previous Form Next Form >

STEP 6: In the left panel, scroll to the “Status Options” section. Click “Payment Request Submitted.”

The screenshot shows a dark blue sidebar with a menu. The 'Status Options' section is highlighted, and it contains three options: 'Payment Request Submitted', 'Payment Request Cancelled', and 'Payment Request On Hold'.

Status Options

- Payment Request Submitted
- Payment Request Cancelled
- Payment Request On Hold