Texas General Land Office

Community Development & Revitalization

User Guide to the

Texas Integrated Grant Reporting (TIGR) Portal

DRAFT - Version 1.3

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Introduction to the User Guide

The TIGR Portal is the external-facing component of the larger Texas Integrated Grant Reporting (TIGR) system, the back-office application that is used by the Texas General Land Office's Community Development and Revitalization division for grant management. TIGR is the system of record for all Community Development Block Grant – Disaster Recovery (CDBG-DR) grant management and reporting. Additionally, it is the data source for quarterly reporting in U.S. Department of Housing and Urban Development's (HUD) Disaster Recovery Grant Reporting (DRGR) system. All grant program initiated after 2018 are managed in TIGR.

The purpose of this document is to provide TIGR Portal users with step-by-step instructions on carrying out the three basic functions of the Portal: submitting applications, managing projects and submitting payment requests. The target audience for this guide is primarily entities external to the GLO such as subrecipients (cities, counties, COGs) and contract grant administrators.

This user guide does not attempt to address topics of general grant management. A solid understanding of grant administration terms and processes will be required to successfully use the Portal.

This guide will be updated periodically in order to more clearly describe how to use the Portal and as enhancements are made to the Portal. Suggestions for improvements and updates are welcomed and should be emailed to TIGRhelp@recovery.texas.gov

Chapter 1 – Navigation in the TIGR Portal

This chapter will cover some of the basic navigation features within the Portal as well as some of the unique features for accessing information. The information in this chapter will apply to all of the functions of the Portal application and therefore it is important that you understand each of these features before you begin using the Portal.

First, users will launch the TIGR Portal through the following link:

https://cdrportalprd.dynamics365portals.us

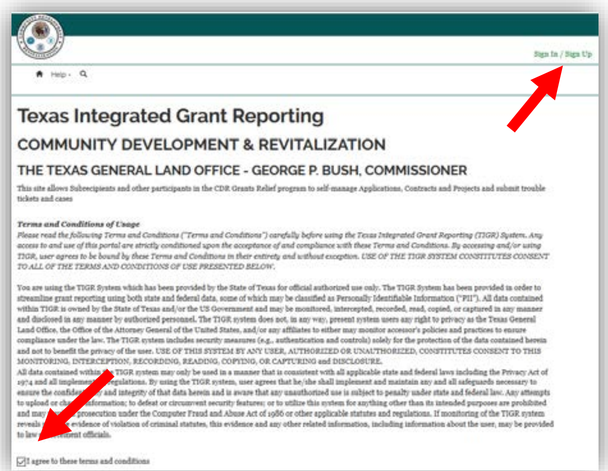
The TIGR Portal can be accessed with a web connection from any of the following web browsers:

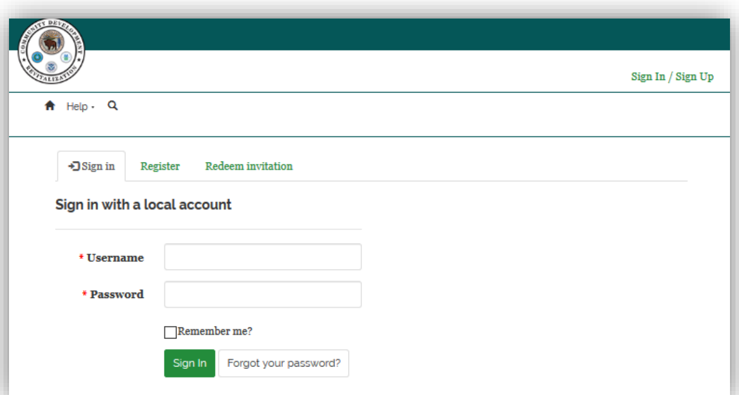
Internet Explorer v 11
Microsoft Edge
Google Chrome v68+
Firefox v60+

Note: TIGR does not support other browsers such as Safari, Opera, etc.

Logging into the TIGR Portal

First, check the box at the bottom of the home page acknowledging the terms and conditions and then click the link at the upper right of the page to sign in.





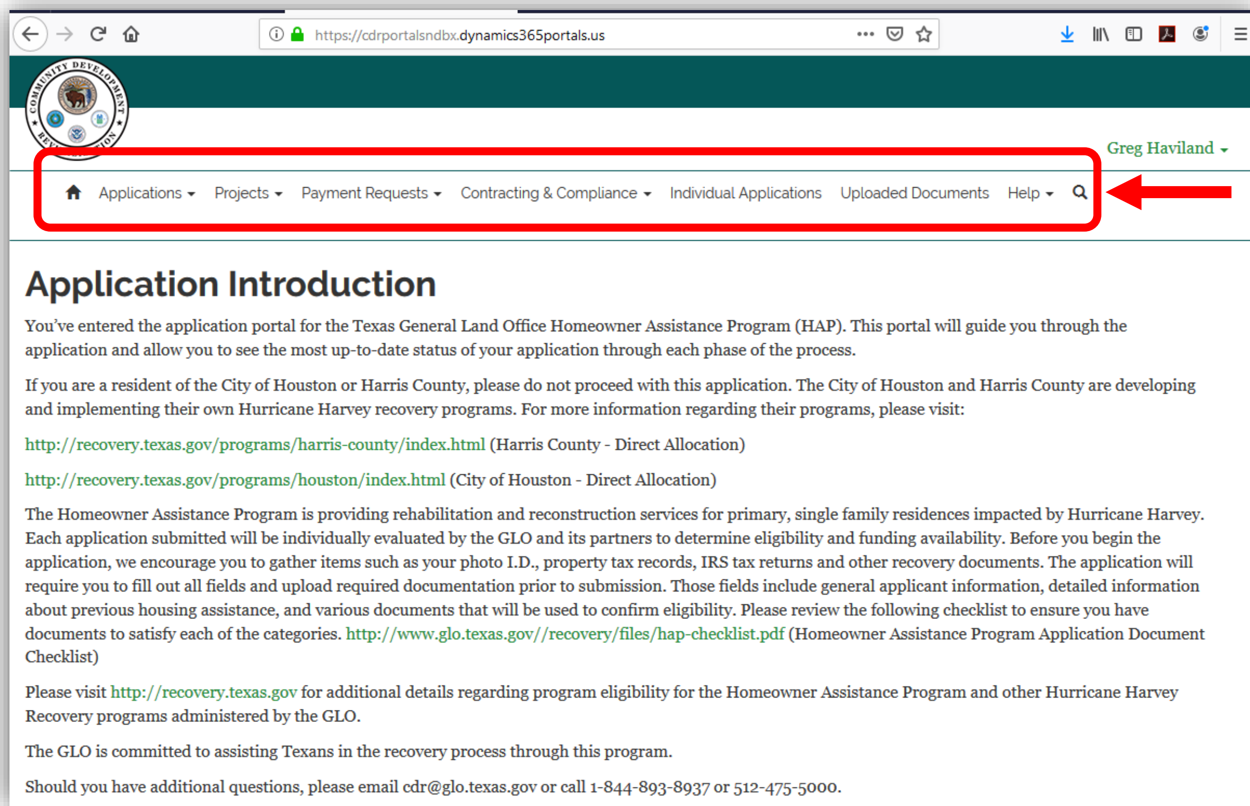
Sign in with the User ID that you were provided and your password.

If you have forgotten your User ID or send an email to TIGRhelp@recovery.texas.gov

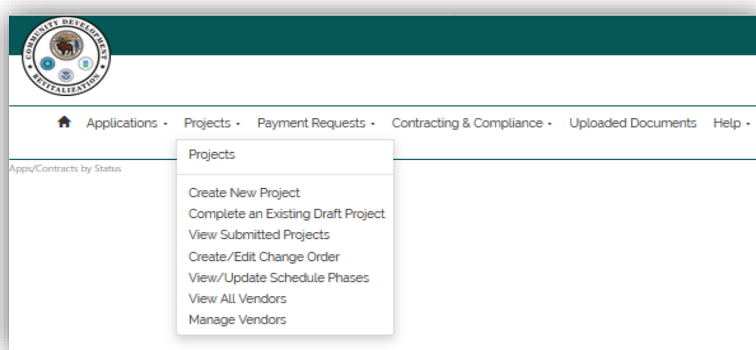
If you have forgotten your password, click on the link entitled **Forgot your password?**

Basic Navigation

The primary tool for navigation in the TIGR Portal is the menu bar at the top of every page. The menu is laid-out based on the chronological lifecycle of a grant.

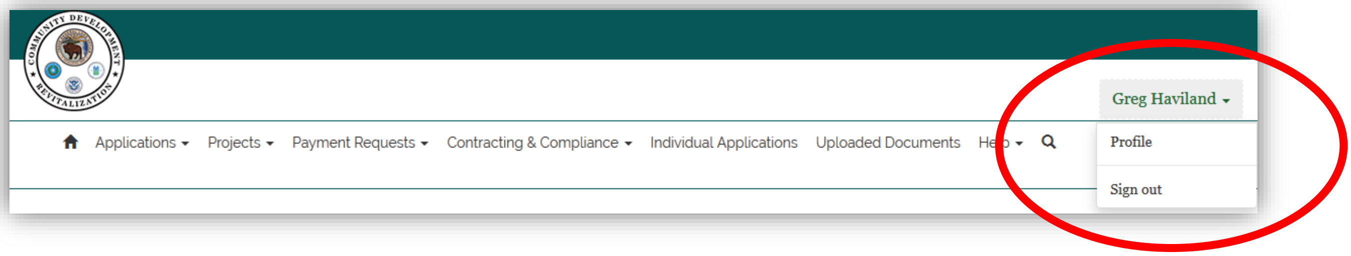


Each of the menu options contains functions within that category. This is an example of the functions available under the Project menu.

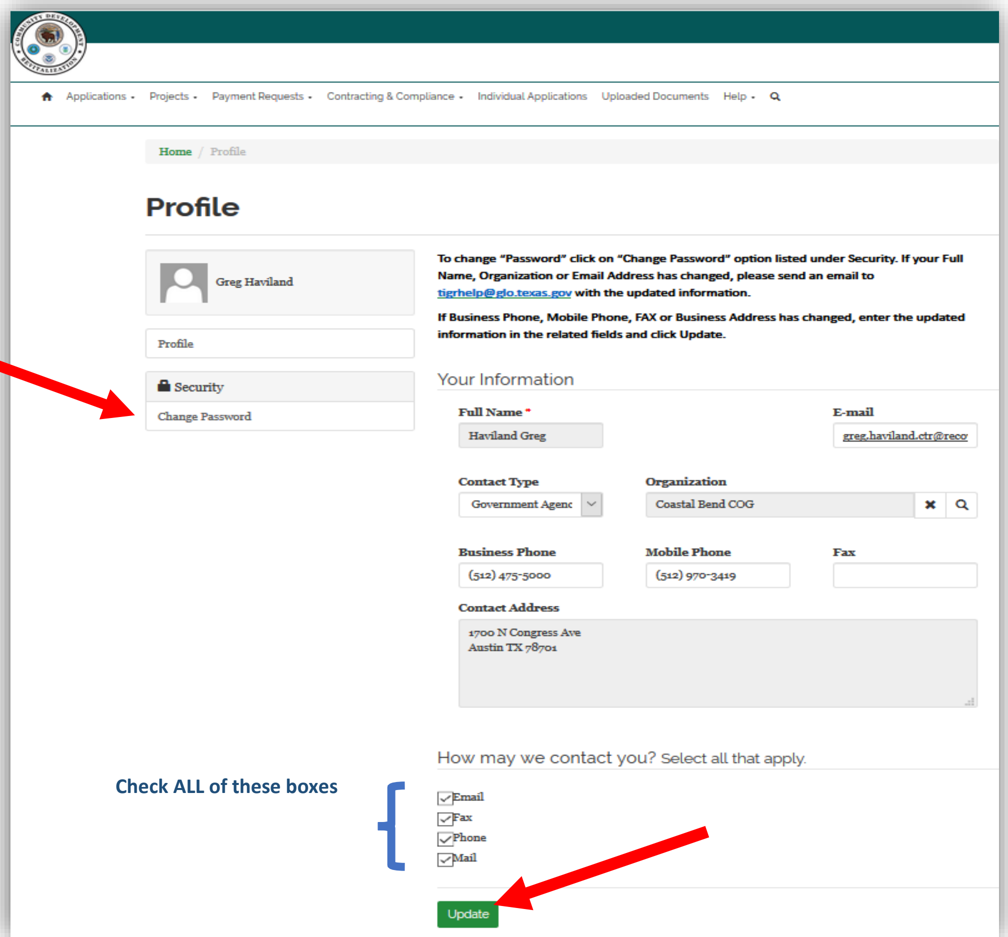


Your TIGR Portal Profile

Each registered user can access their name, organization and contact information through their Profile. To access this information, open the menu under your name and select **Profile**.



Here you can change your password

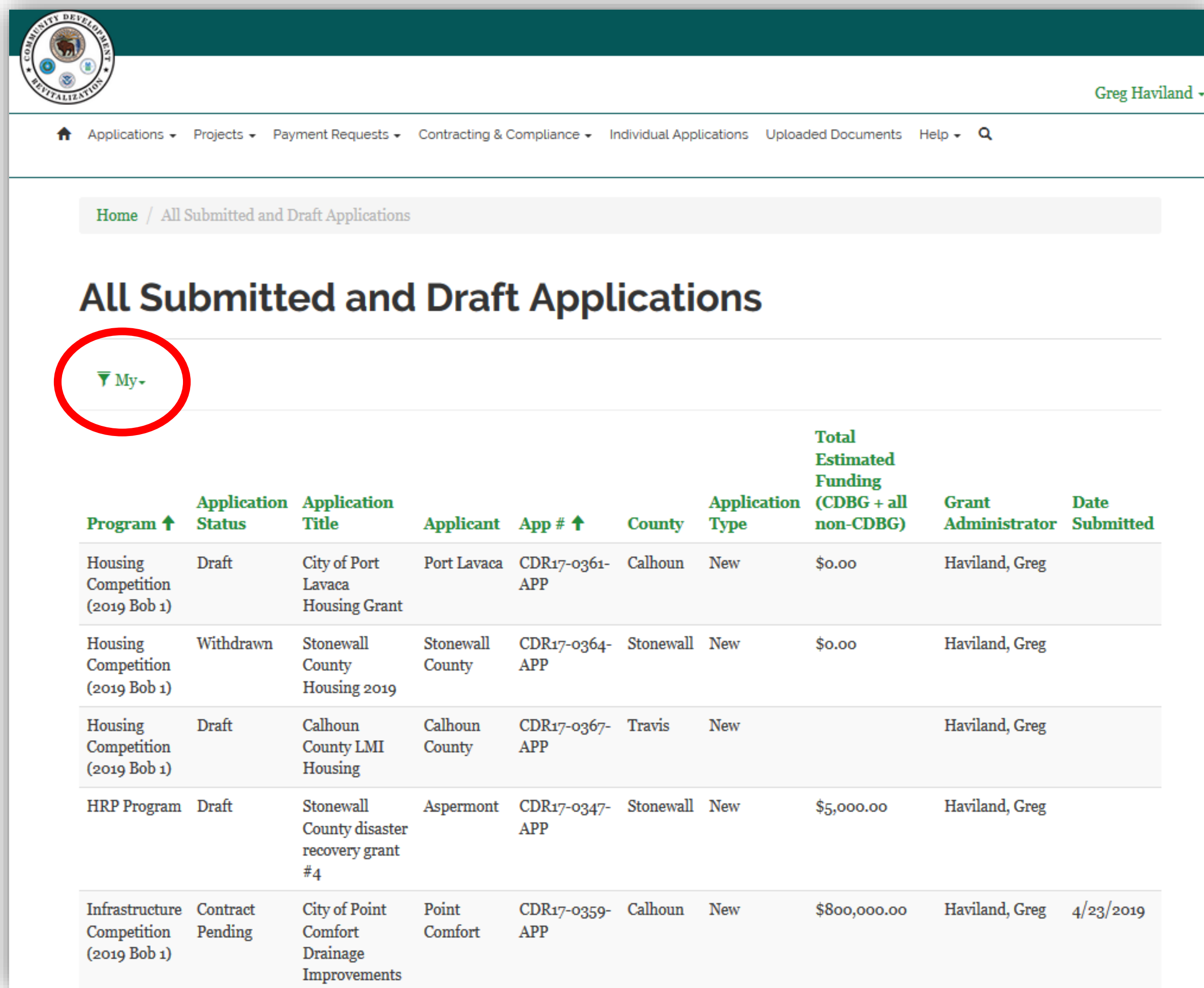


If you make any changes, make sure to click **Update** to save these. Be careful about changing your organization as this will impact the information that you can see in the rest of the Portal.

Filtering: My vs My Organization

On many of the landing pages TIGR will present the user with a list of entries. These landing pages are used when viewing previously-entered applications, projects, or payments. On these pages, the filter in TIGR defaults to '**My'**, which will be those items that you have personally entered, or they have been entered using your user ID.

The figure below shows all of the applications that my personal User ID has entered as evidenced by the default filter '**My'**.


Greg Haviland

Applications Projects Payment Requests Contracting & Compliance Individual Applications Uploaded Documents Help

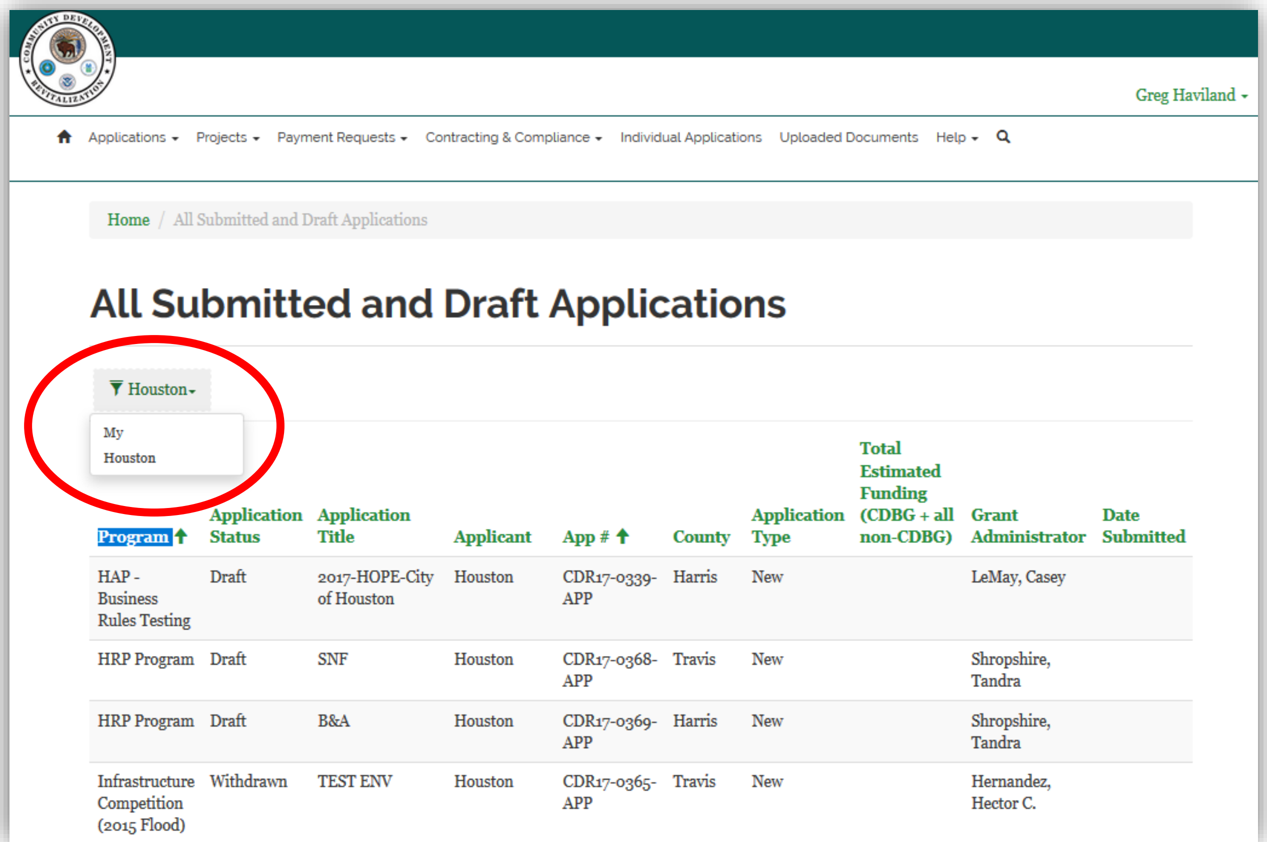
Home / All Submitted and Draft Applications

All Submitted and Draft Applications

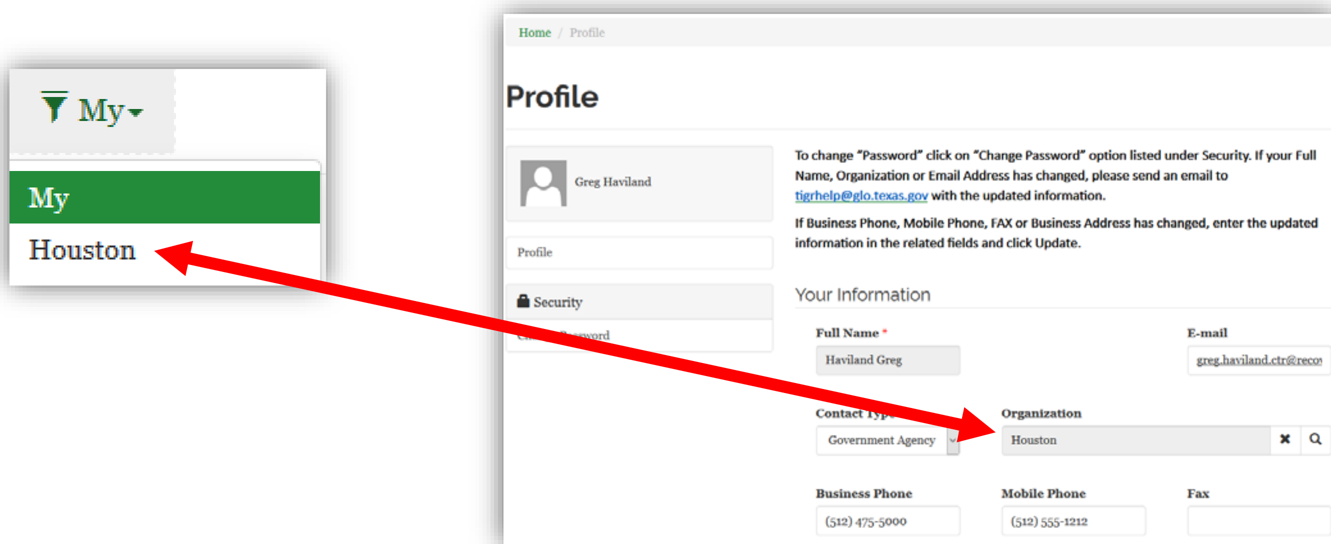
My

Program	Application Status	Application Title	Applicant	App #	County	Application Type	Total Estimated Funding (CDBG + all non-CDBG)	Grant Administrator	Date Submitted
Housing Competition (2019 Bob 1)	Draft	City of Port Lavaca Housing Grant	Port Lavaca	CDR17-0361-APP	Calhoun	New	$0.00	Haviland, Greg	
Housing Competition (2019 Bob 1)	Withdrawn	Stonewall County Housing 2019	Stonewall County	CDR17-0364-APP	Stonewall	New	$0.00	Haviland, Greg	
Housing Competition (2019 Bob 1)	Draft	Calhoun County LMI Housing	Calhoun County	CDR17-0367-APP	Travis	New		Haviland, Greg	
HRP Program	Draft	Stonewall County disaster recovery grant #4	Aspermont	CDR17-0347-APP	Stonewall	New	$5,000.00	Haviland, Greg	
Infrastructure Competition (2019 Bob 1)	Contract Pending	City of Point Comfort Drainage Improvements	Point Comfort	CDR17-0359-APP	Calhoun	New	$800,000.00	Haviland, Greg	4/23/2019

The Portal has the ability to display all of the items entered either by you or by anyone in your Organization. In this case the City of Houston. On all of these landing pages you have an option of filtering by My or My Organization. ***<u>Be aware of this filter, this trips up many users.</u>***

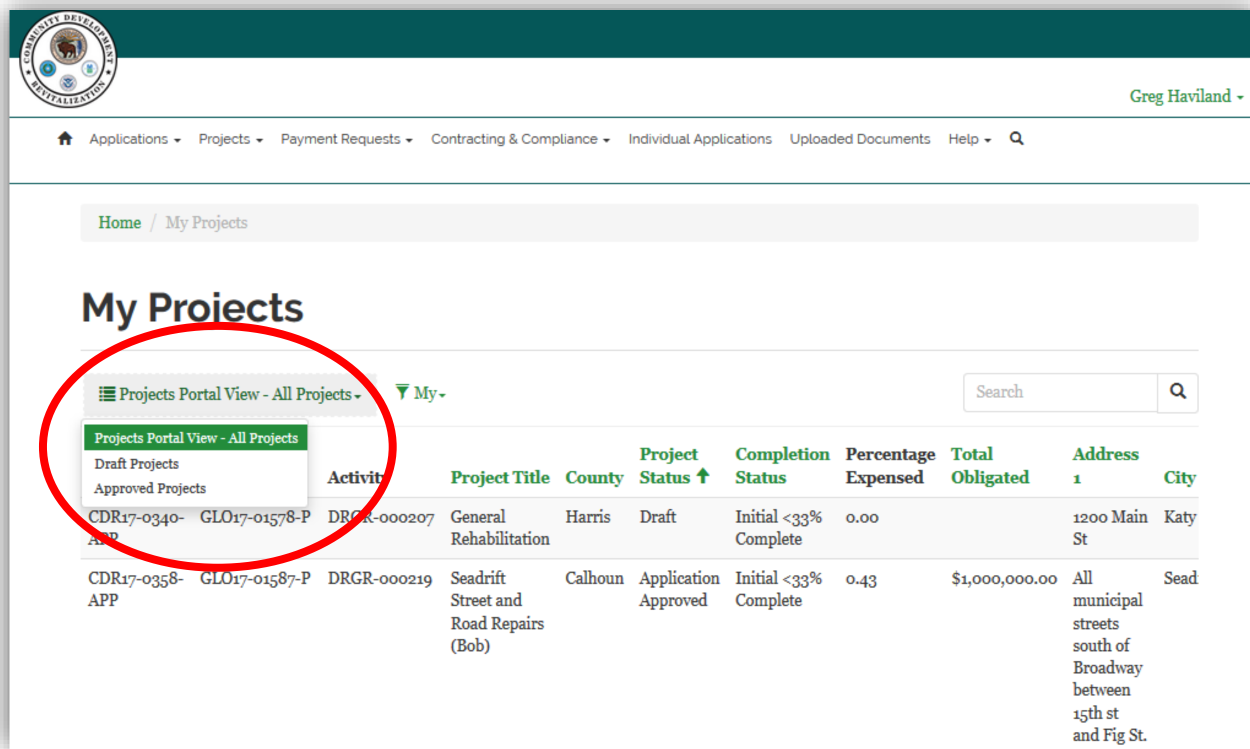


What appears in your filter is the organization that is in your profile.

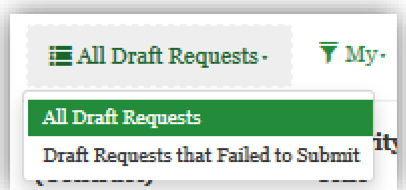


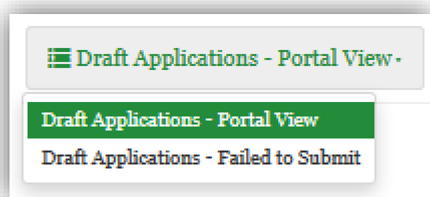
Data-Specific Filtering

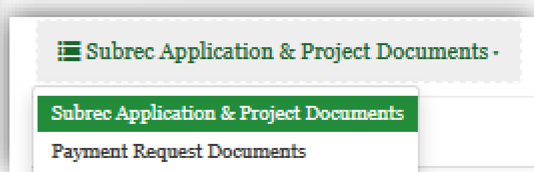
In addition to the **My/My Organization** filtering on landing pages, many also have an addition set of filters that vary according to the data that is being presented. These filters can be used to further refine the tabular information that is presented. These filters are in addition to the **My/My Organization** filters.



The specific filters that are displayed are topical and will vary depending on the landing page that you are on. Look for these when as you navigate through TIGR. Other examples of these filters include:







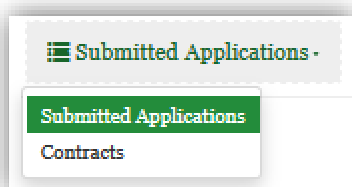


Table Sorting

In addition to the filtering capabilities in the TIGR Portal, all the pages where tables of data are displayed with headers at the top of the tables can be sorted. This applies whether the data is related to applications, payments, uploaded documents or submitted reports. Below is an example.

All Submitted and Draft Applications

My

Program	Application Status	Application Title	Applicant	App #	County	Application Type	Total Estimated Funding (CDBG + all non-CDBG)	Grant Administrator	Date Submitted
HRP Program	Draft	Stonewall County disaster recovery grant #4	Aspermont	CDR17-0347-APP	Stonewall	New	$5,000.00	Haviland, Greg	
Infrastructure Competition (2019 Bob 1)	Contract Pending	City of Point Comfort Drainage Improvements	Point Comfort	CDR17-0359-APP	Calhoun	New	$800,000.00	Haviland, Greg	4/23/2019
Infrastructure Competition (2019 Bob 1)	Initial Review	Port O'Connor Drainage Improvements	Calhoun County	CDR17-0360-APP	Calhoun	New	$2,200,000.00	Haviland, Greg	
Housing Competition (2019 Bob 1)	Draft	City of Port Lavaca Housing Grant	Port Lavaca	CDR17-0361-APP	Calhoun	New	$0.00	Haviland, Greg	
Infrastructure Competition (2019 Bob 1)	Program Team Review	City of Port Lavaca Infrastructure Grant	Port Lavaca	CDR17-0362-APP	Calhoun	New	$28,000,000.00	Haviland, Greg	4/29/2019

By clicking on any Green-Colored header title, the entire represented dataset will be resorted according to that column, in ascending order. Clicking on the same title again will re-sort the data in descending order. Use this in conjunction with the filtering functions.

With certain programs there may be hundreds or thousands of applications, projects or payments. Rather than just flipping through pages of data, now you can more easily find the entry that you are looking for by using combinations of these filters and sorting options:

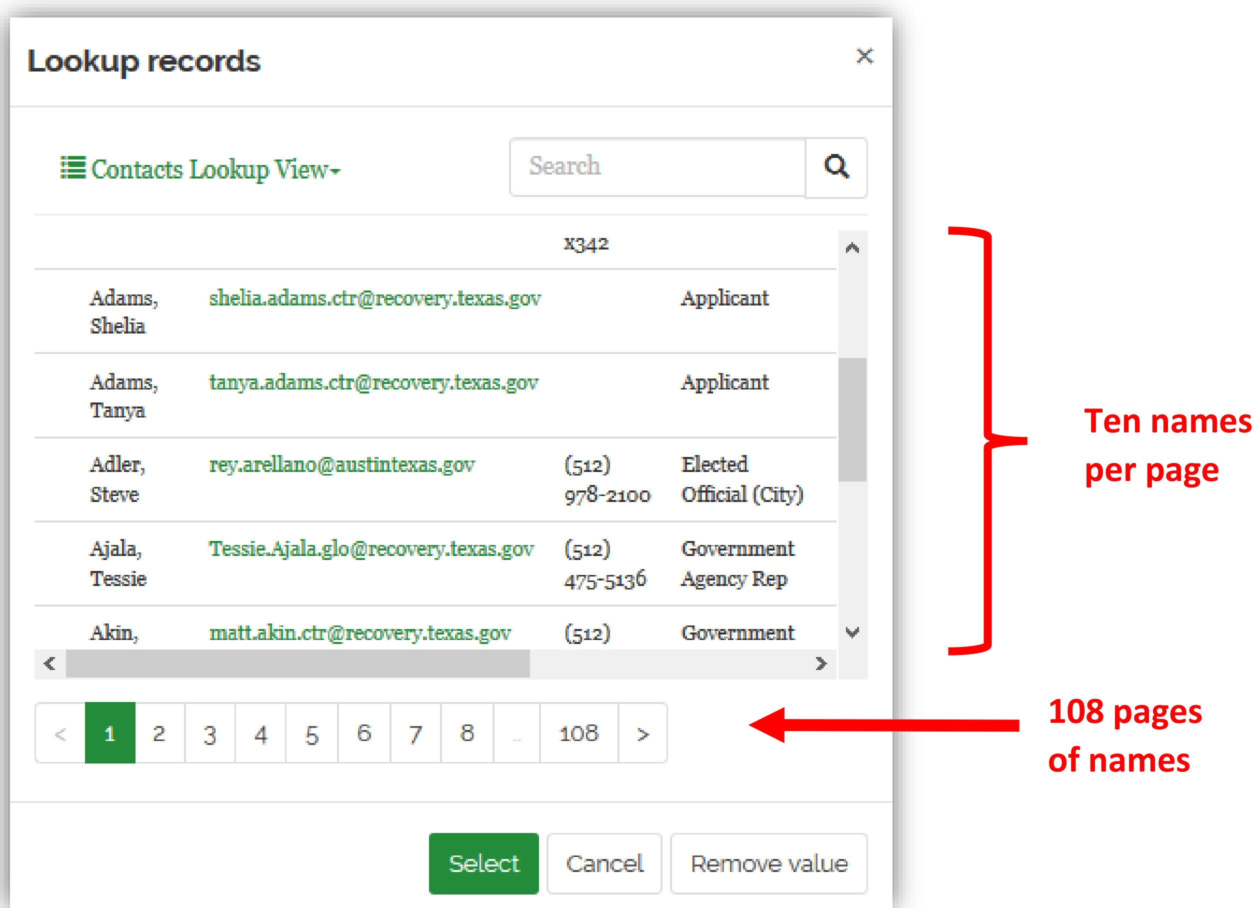
- My/My Organization
- Data-Specific Filtering
- Table Sorting

Searching Within the TIGR Portal

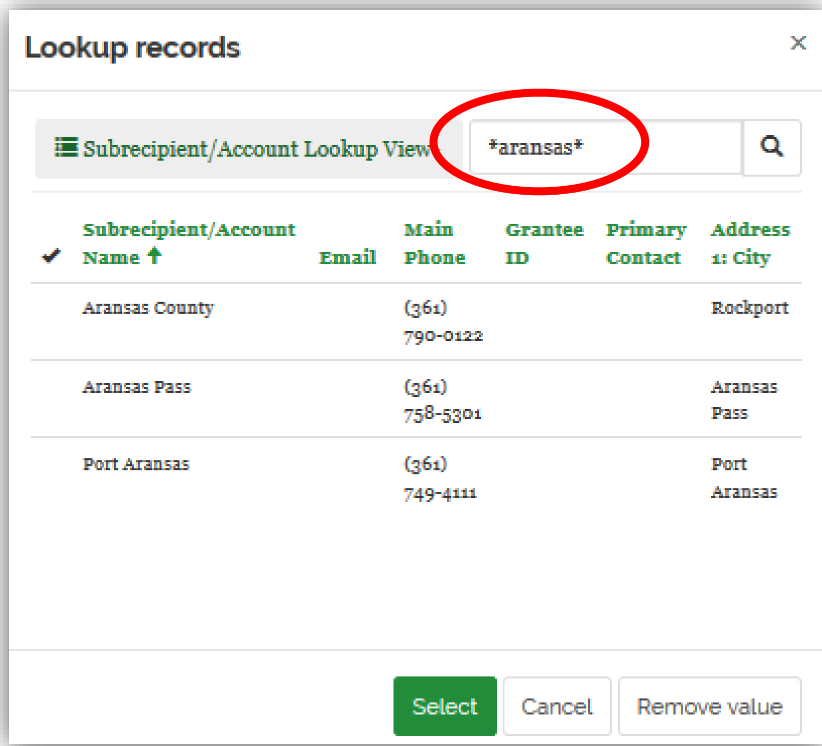
For certain data fields in TIGR the user is asked to select from a list of records. Often there are hundreds of records from which the user must chose. Examples where you may have to sift through many records include:

- Individuals or Applicants
- Organizations (cities, counties, COGs)
- Vendors
- Programs
- Document Templates

The figure below shows the search page that appears when you are asked to select the name of a person (contact) in the system. In this case there are 1,080 names from which to select, presented in 108 blocks of ten contacts. You can tab through all of these until you find the name you are looking for, or you can use the native search feature in the TIGR Portal.

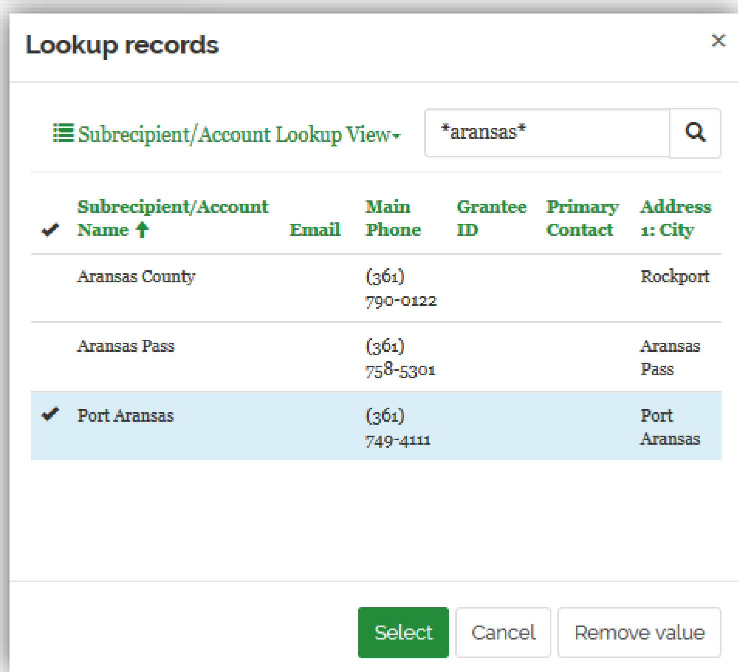


If you are presented with a long list of records from which to choose, use the search box in the upper right-hand corner. In the example below the user wants to find the **City of Port Aransas**. The easiest way to find this entry is to perform a **Wildcard Search**. In TIGR, the * (asterix) symbol acts as a wildcard.



If I enter the word ***aransas*** (with an asterix on each end) and click **Select**, TIGR will show me all of the entries that have the word **aransas** in them.

The asterix on each end is important, it says that you don't care what text precedes the word ***'aransas'*** or what text follows as long as ***'aransas'*** is in the title.



This wildcard search returned three entries all of which have the word Aransas somewhere in the name. Now, mark on the entry for Port Aransas and click Select when you are done.

This is generally an easier way to find what you are looking for rather than paging through hundreds of entries.

This works in ANY search box in TIGR

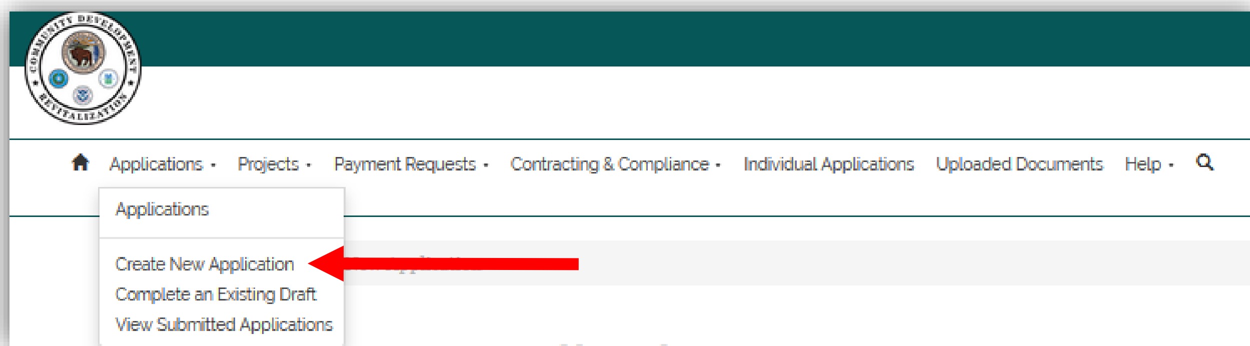
Chapter 2 – Submitting Applications

This chapter describes the process for entering, submitting and viewing applications in the TIGR Portal. Completed applications are submitted for review and approval; once approved, they become contracts. In the past, for some grant programs, the grant application and project application were part of a single process. However, in TIGR, these processes have been separated. Chapter 3 of this User Guide describes the steps for creating a project.

Creating a New Application

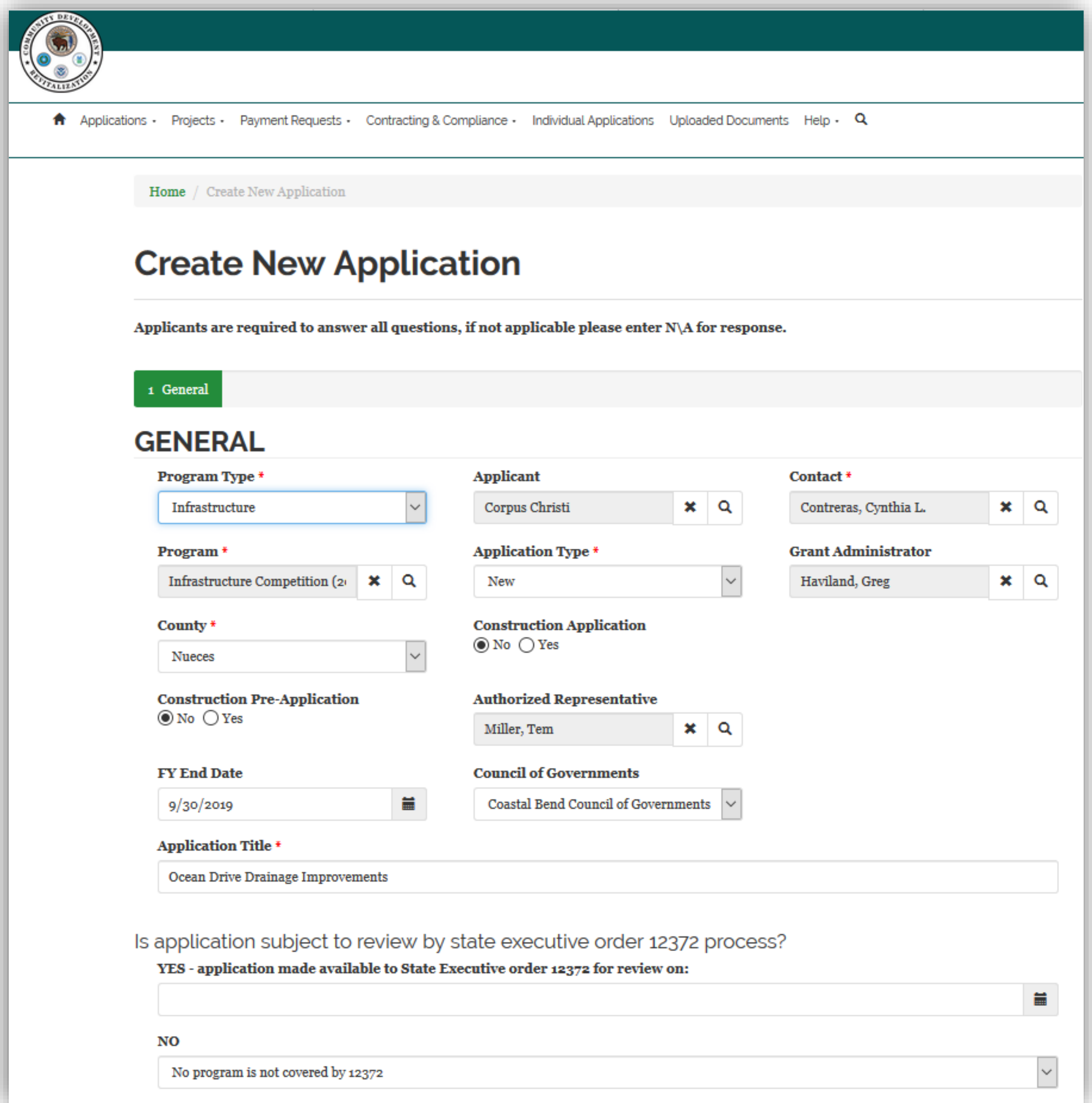
Step 1: Enter General Information

To start a new grant application the user needs to first enter general information about the request. To begin, pull down the Applications menu and select **Create New Application**.



This will bring up the **Create New Application** window

Enter the information in the **General** section of the **Create New Application** window. You are required to answer ALL questions in this section.



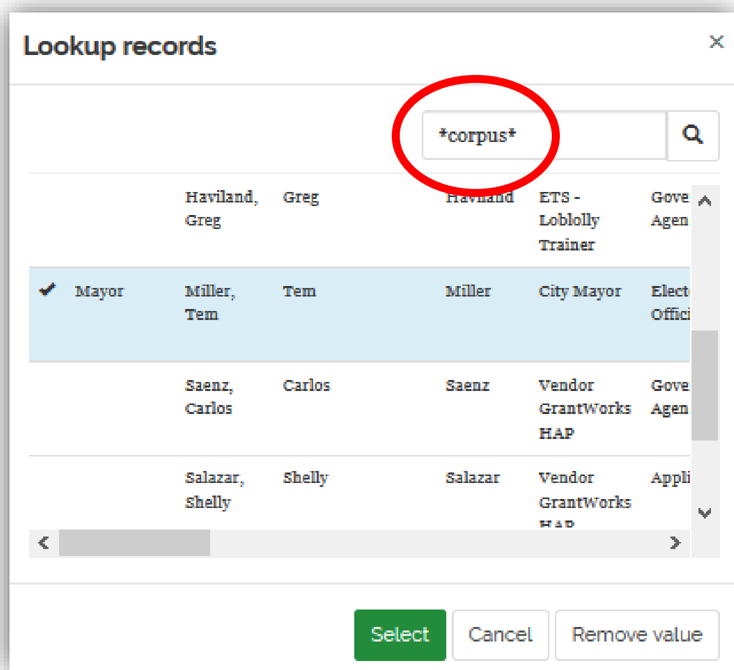
Enter the Program Type. Options include:

- *Single Housing*
- *Housing*
- *Buyout and Acquisition*
- *DALHR*
- *Planning*
- *Multiple Housing*
- *Infrastructure*
- *MHU (Mobile Housing Units)*
- *Direct Lease*
- *Administration*

Applicant: This is the subrecipient or entity making the application.

Contact: This is the primary point of contact for the applicant and the user name that the Portal will use when displaying **My** applications. See Chapter 1 of this User Guide for more information on the **My vs My Organization** filter.

Program: This is the program for which you are applying. It is very important that you select the correct program, and many of the programs have similar names. Therefore, if you are unsure which program to select, contact your GLO Grant Manager.

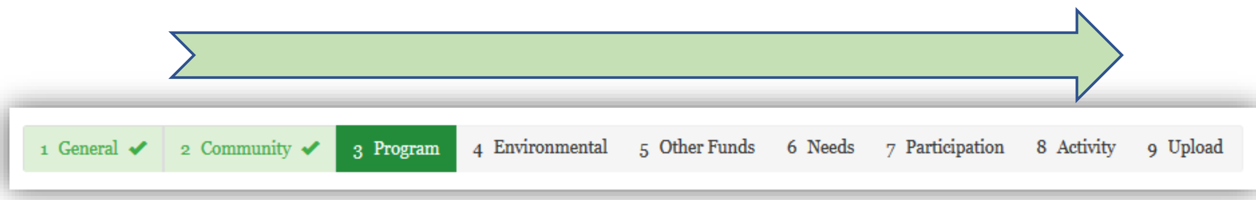


When searching for the Applicant, Contact, Grant Administrator or Authorized Representative, remember to use a wildcard search to filter the records.

When you have responded to all of the questions select 

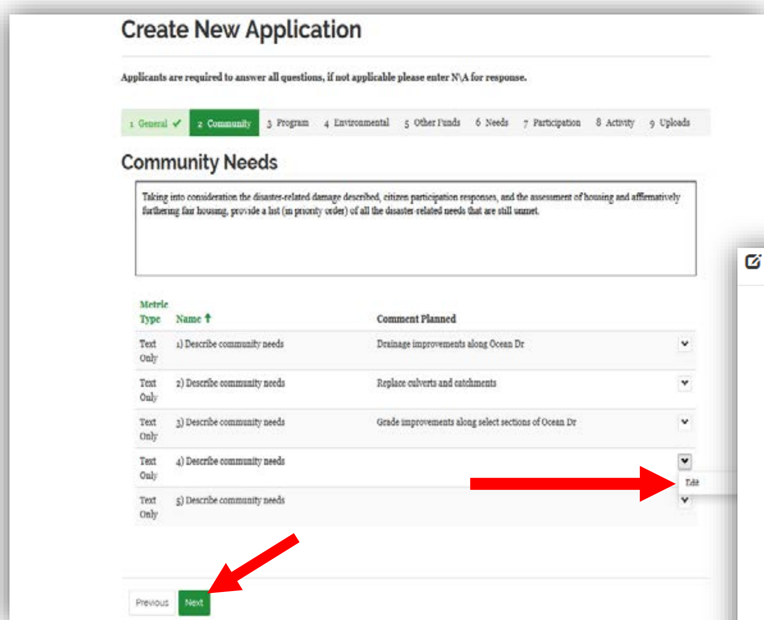
Step 2: Enter Community Needs

From the General Information section to application submission the process is linear and is represented by the menu bar at the top of the page. The TIGR Portal was designed to guide you through the application process.

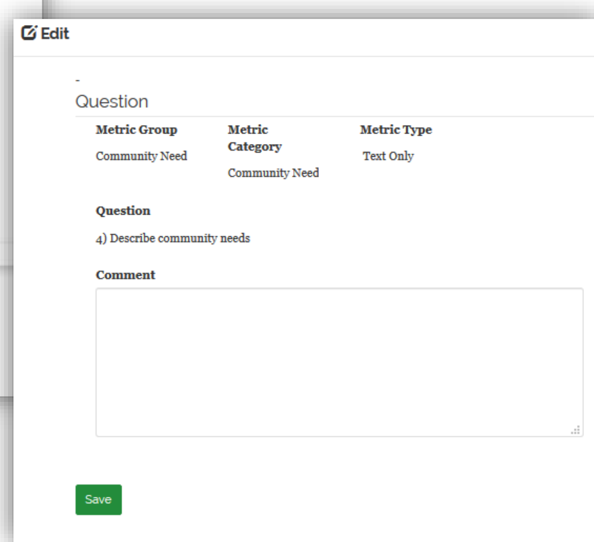


The information in the General section is required for all applications, however, not all of the remaining sections are required for all programs. Check with your GLO Grant Manager to determine if any of the remaining sections are not required for the program to which you are applying.

To respond to the Community Needs questions, click on the down arrow to the right of each question and select **Edit**.



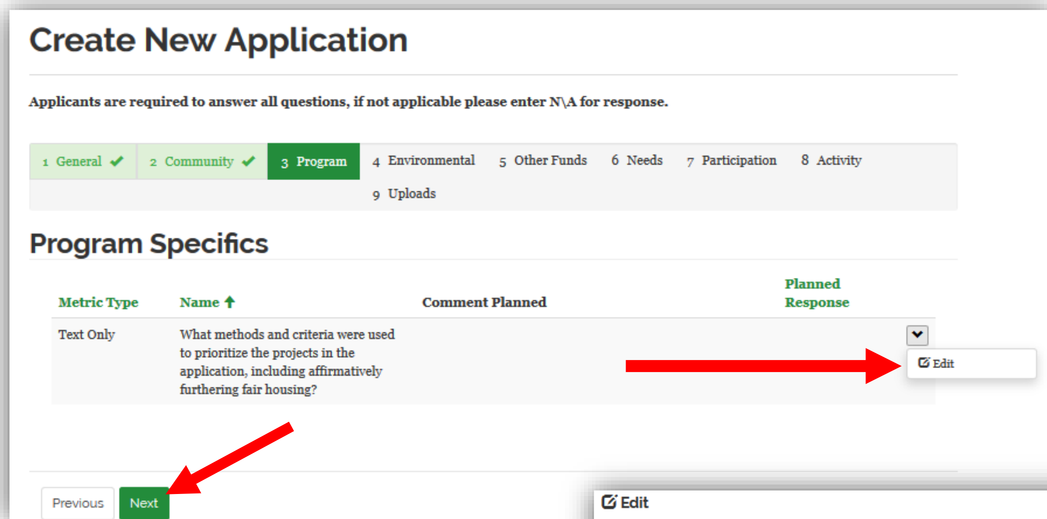
This will pull up a pop-up box to allow you to respond to the question. Repeat this process for all questions that you intend to answer.



Click **Save** when you are done to continue to the **Program Specifics** page.

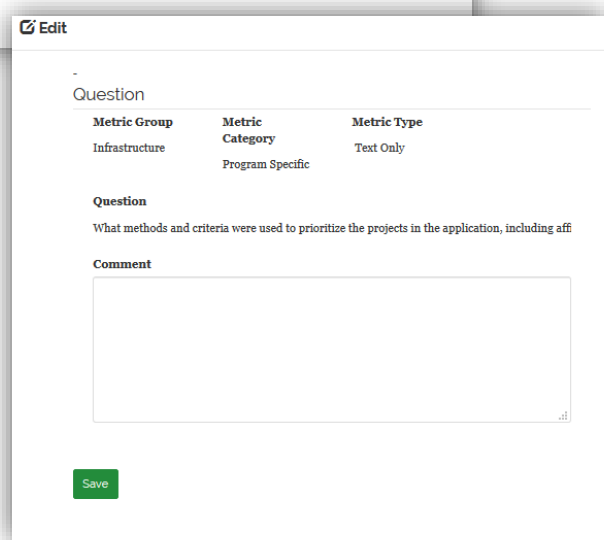
Step 3: Respond to Program Specifics

You may be asked one or more questions in the Program Specifics section. To respond click on the down arrow to the right of each question and select **Edit**.



This will pull up a pop-up box to allow you to respond to the question. Repeat this process for all questions that you intend to answer.

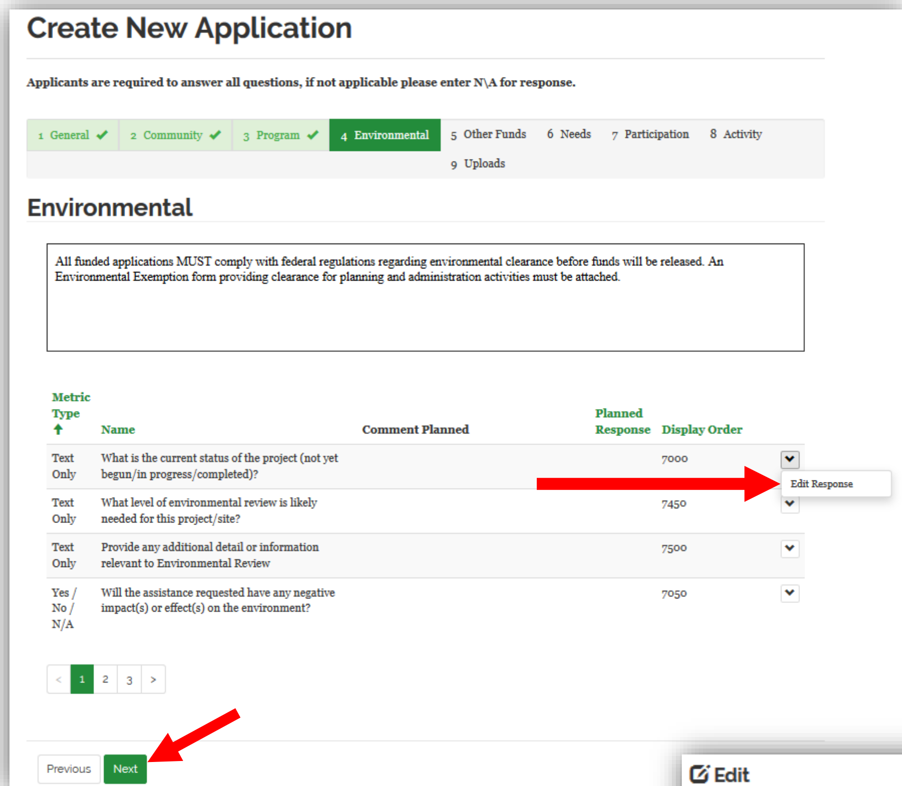
Click **Save** when you are done to continue to the **Environmental Questions.**



> ***TIGR Tip:** It is a really good idea to periodically save the information as you are entering it. Scroll to the bottom of the page and select the **Save** button. After saving you can continue to enter information.*

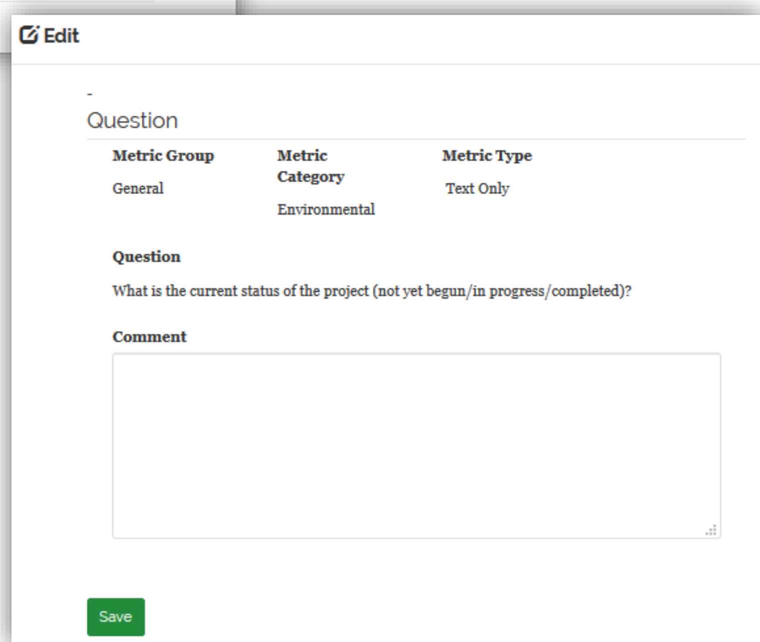
Step 4: Respond to Environmental Questions

To provide responses to the environmental questions click on the down arrow to the right of each question and select **Edit**.



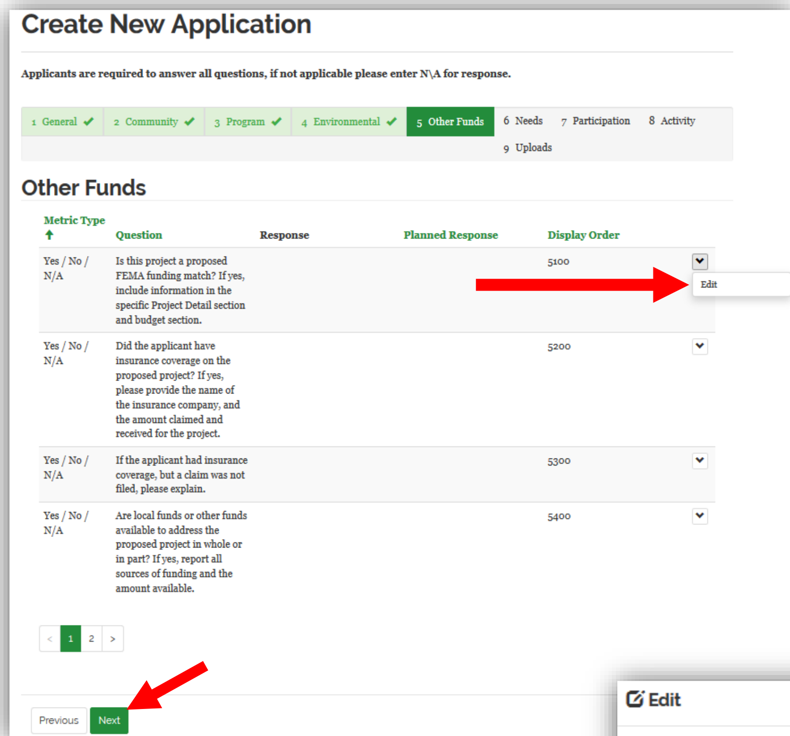
This will pull up a pop-up box to allow you to respond to the question. Repeat this process for all questions that you are required to answer.

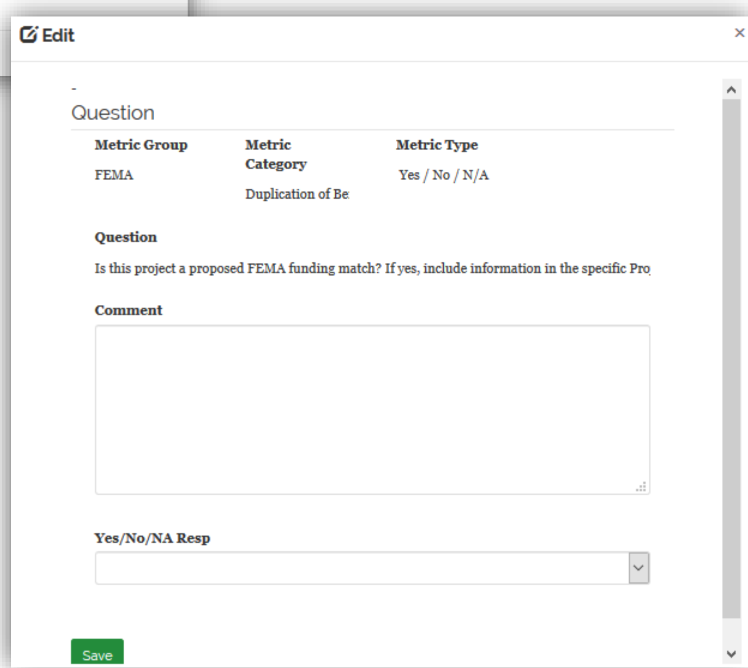
Click **Save** when you are done to continue to the **Other Funds** Questions.



Step 5: Respond to Questions on Other Funds

To provide responses to the questions relating to the other sources of funds that may be available click on the down arrow to the right of each question and select **Edit**.



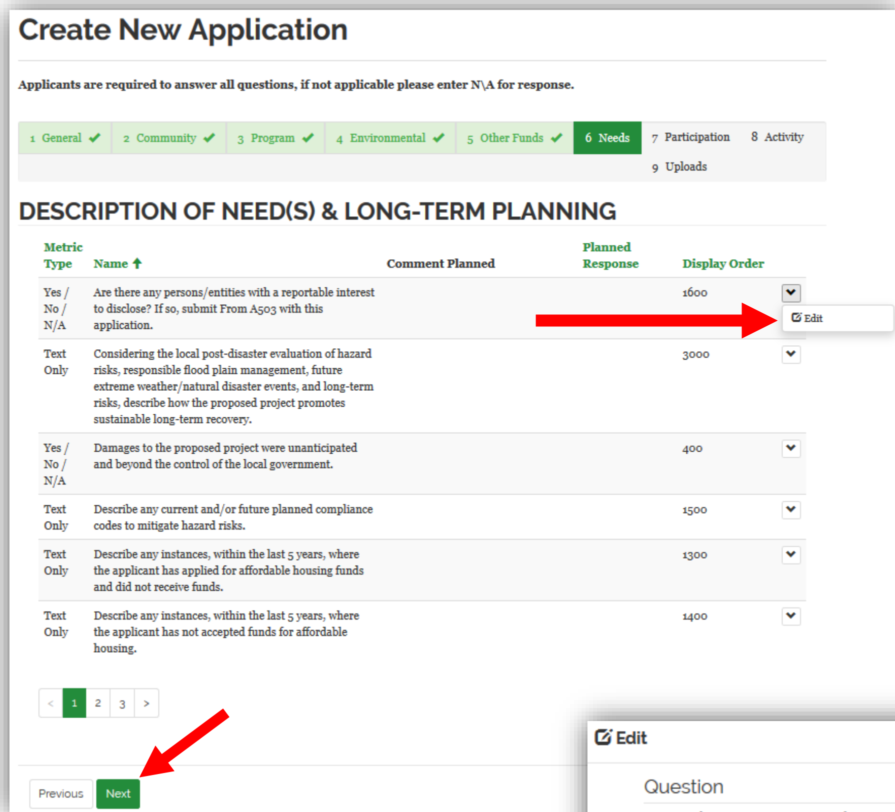


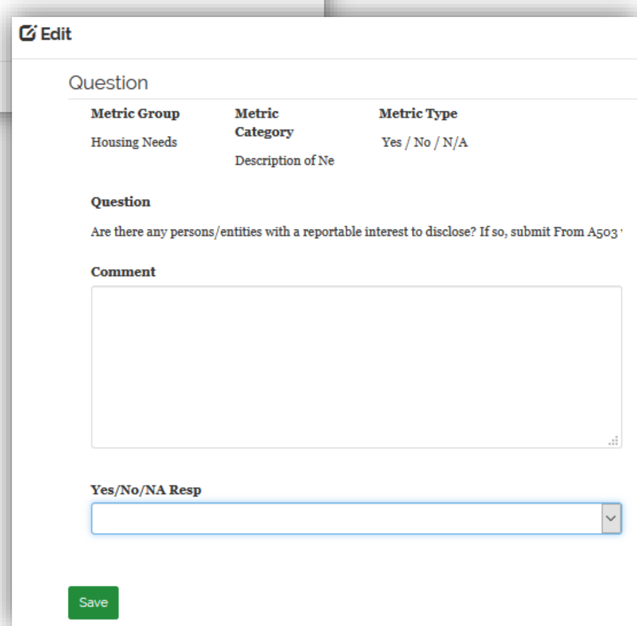
This will pull up a pop-up box to allow you to respond to the question. In addition to a text response, these may also require a **Yes/No/NA** response. Repeat this process for all questions that you intend to answer.

Click **Save** when you are done to continue to the **Needs and Long-Term Planning** Questions.

Step 6: Enter Description of Need and Long-Term Planning

To provide responses to the needs and long-term planning questions click on the down arrow to the right of each question and select **Edit**.



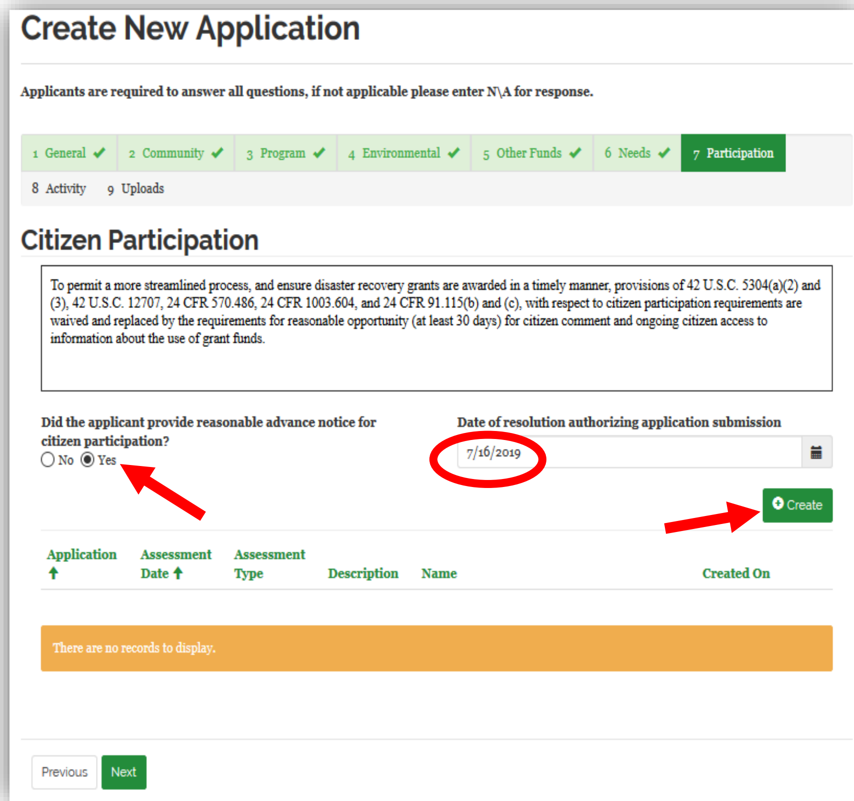


This will pull up a pop-up box to allow you to respond to the question. In addition to a text response, these may also require a **Yes/No/NA** response. Repeat this process for all questions that you intend to answer.

Click **Save** when you are done to continue to the **Citizen Participation Questions.**

Step 7: Enter Information on Citizen Participation

The Citizen Participation page requires the appicant to demonstrate that there has been opportunity for citizen input. Respond to the two questions and then enter information on each opportunity that your organization has held for citizen participation.



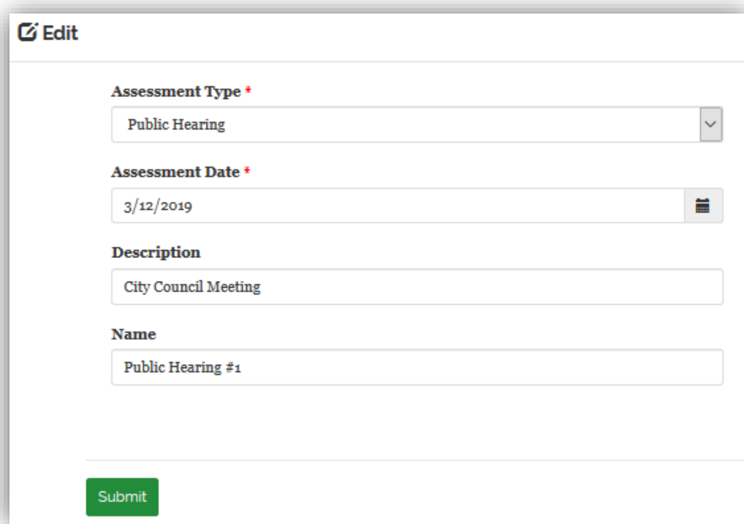
Citizen participation can include the following **Assessment Types**:

- Public Hearing
- Community Meeting
- Community Survey
- Existing Study
- Other

Click **Create** to pull up a pop-up box to allow you enter information about each opportunity for citizen participation.

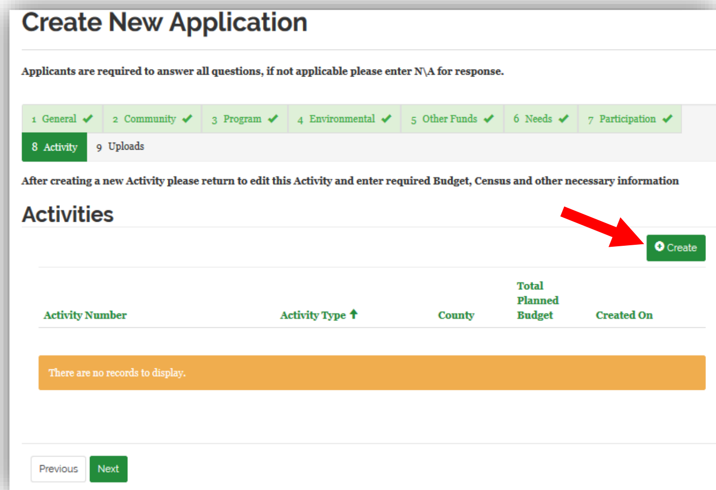
After you have entered each participation opportunity click Submit to save this record and add another if necessary.

Click **Next** when you are done to continue to the **Activities page.**



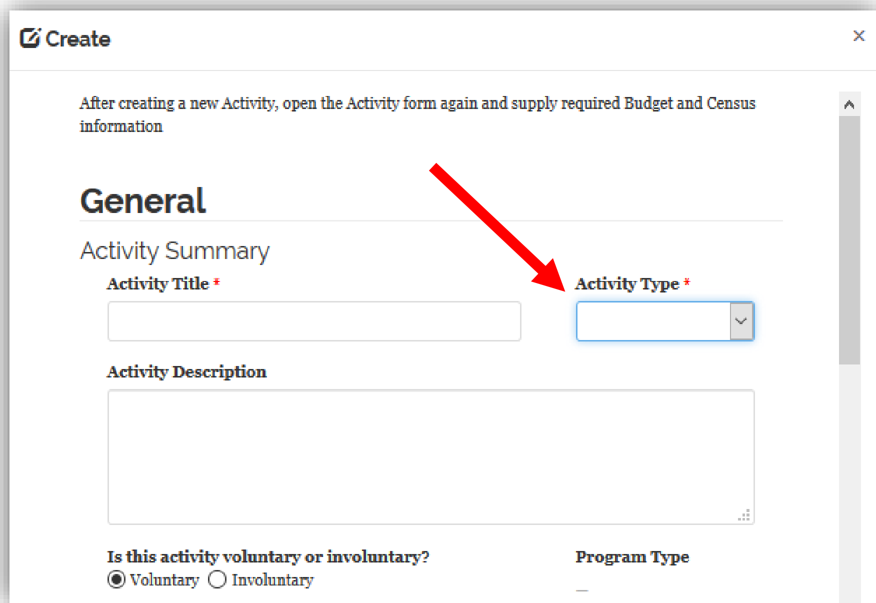
Step 8: Create Activities and Budgets

This section allows the user to describe the activities proposed by this application as well as the budget for each activity. To begin, select **Create** to enter the first activity.



A new window will appear that will ask for information by **DRGR Activity Type**. The first step is to select a **DRGR Activity Type** from the drop-down list box.

Activity Type: **DRGR Activity Types** are selected from a fixed list based on Federal HUD standards. Separate budgets and activity descriptions are required for each **DRGR Activity Type.** The current list of **DRGR Activity Types** is presented below.



DRGR Activity Types as of January 2019

Acquisition - buyout of residential properties
Acquisition - general
Acquisition of buildings for the general conduct of government
Acquisition of relocation properties
Acquisition, construction, reconstruction of public facilities
Administration
Affordable Rental Housing
Capacity building for nonprofit or public entities
Clearance and demolition
Code enforcement
compensation for disaster-related issues (Louisiana and Texas)
Construction of buildings for the general conduct of government
Construction of new housing
Construction of new replacement housing
Construction/reconstruction of streets
Construction/reconstruction of water lift stations
Construction/reconstruction of water/sewer lines or systems
Debris removal
Dike/damn/stream-river bank repairs
Disposition
Econ. Development or recovery activity that creates/retains jobs
Homeownership Assistance (with waiver only)
Homeownership Assistance to low-and moderate-income
Housing incentives to encourage resettlement
Planning
Privately owned utilities
Public Services
Rehabilitation/reconstruction of a public improvement
Rehabilitation/reconstruction of other non-residential structures
Rehabilitation/reconstruction of public facilities
Rehabilitation/reconstruction of residential structures
Relocation payments and assistance
Rental Assistance (waiver only)
Tourism (waiver only)

Once a **DRGR Activity Type** has been selected, enter the remaining information in this window:

Activity Title

Activity Description

Voluntary/Involuntary indicator

Program Type - this is automatically populated once this record is saved

Activities to resolve the problem and anticipated outcomes

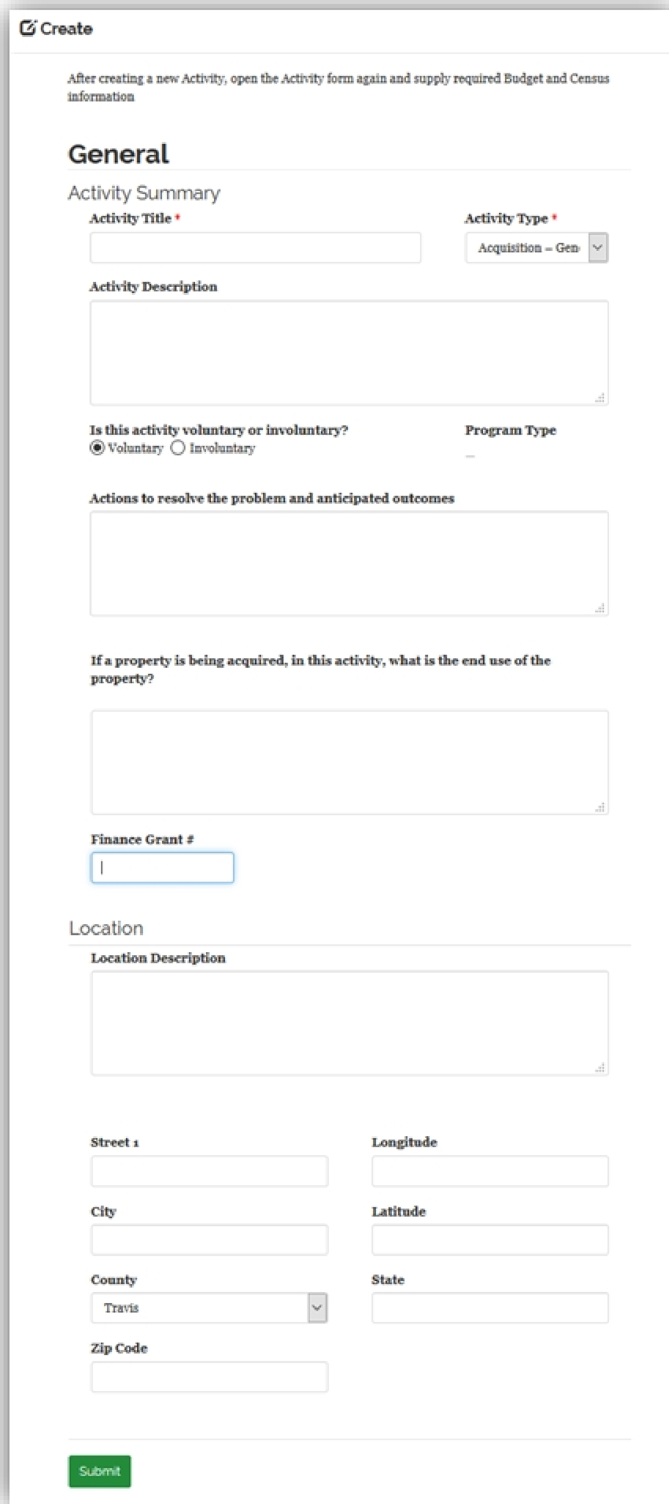
End use of acquired property

Finance Grant # - this information is not required, and the field will be removed in future versions of the TIGR Portal.

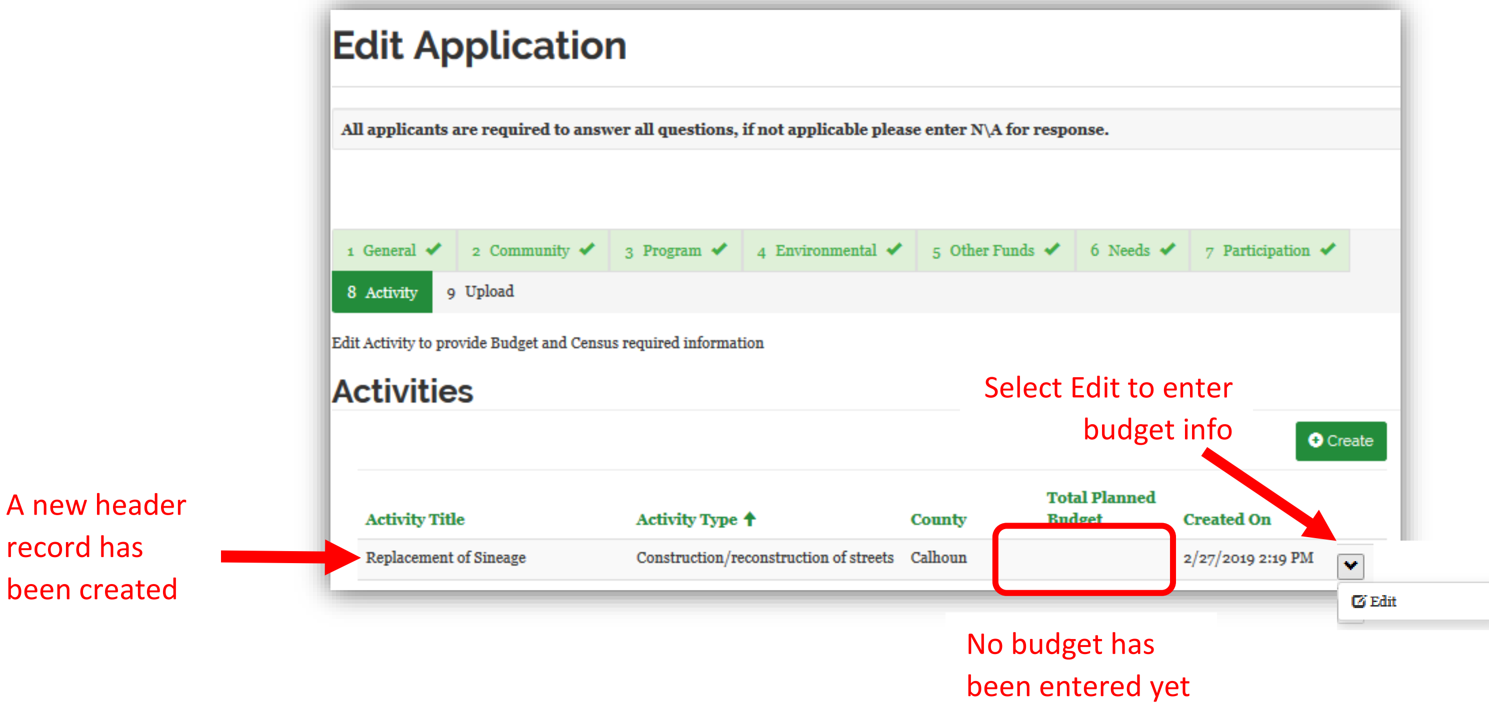
Location Descriptions

County – This currently defaults to Travis, please select the correct county based on the location of this activity.

Select **Submit** when this information is complete. This will return you to the Activities window.

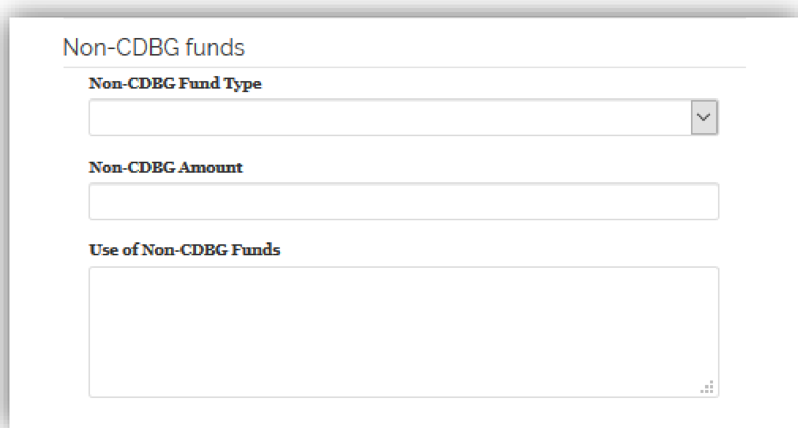


You should now see your new activity record displayed in the table of activities



Now that you have entered and saved the General activity information, TIGR has created a header record for this activity and has added budget fields to the record. You will now need to add the proposed budget information for this activity.

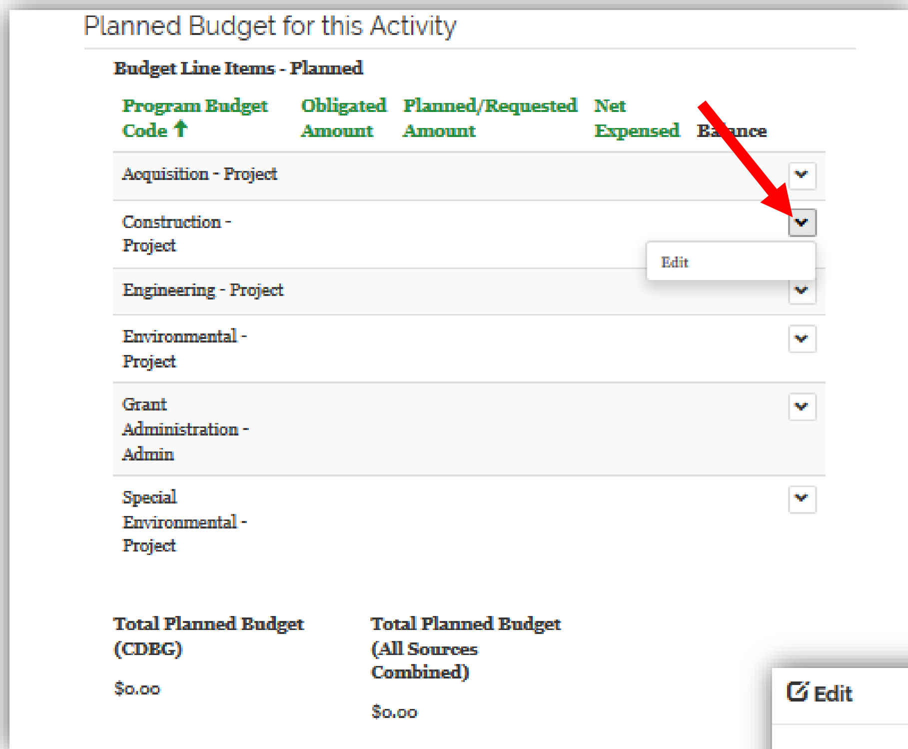
Re-open the record by selecting **Edit** to the right of the new activity line and provide the remaining information for this activity. This section of the application is lengthy. It will ask for information regarding the planned budget, how your application meets national objectives and the demographics of impacted populations.



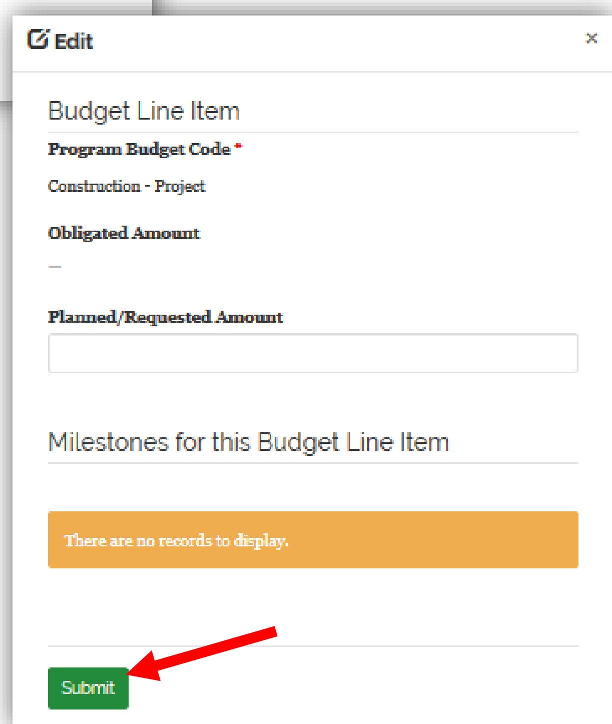
The Activity Summary window will open and re-display the General Activity Summary information that you entered to establish this Activity. Scroll down below General Activity Summary information and respond to the questions in the section on Non-CDBG Funding.

Each activity in your application will have one or more budget lines. The budget lines that are displayed in this section are unique to the program to which you are applying.

Not all of these budget line items (**Program Budget Codes**) will apply to your application. Enter information only for those budget lines that are required for your application. If you are unsure about which budget lines to use, contact your GLO Grant Manager.



To enter budget information, select **Edit** next to the appropriate budget line.

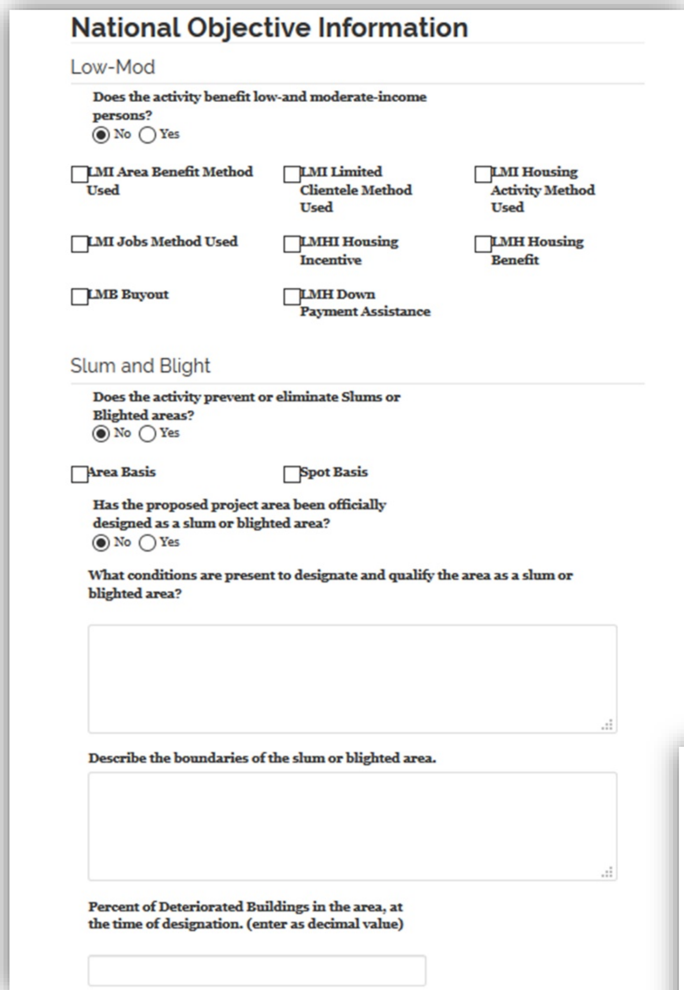


Enter the planned/requested budget amount for this **Program Budget Code** and select **Submit**.

Milestones for this **Budget Line** Item may not appear if there are none established for this **Program Budget Code**.

Repeat this process for each budget line for this **Activity**.

Answer the questions regarding national objectives for low- and moderate-income individuals, if applicable to your application, as well as the questions regarding slum and blight areas.



National Objective Information

Low-Mod

Does the activity benefit low-and moderate-income persons?

(•) No ( ) Yes

[ ] LMI Area Benefit Method Used

[ ] LMI Limited Clientele Method Used

[ ] LMI Housing Activity Method Used

[ ] LMI Jobs Method Used

[ ] LMHI Housing Incentive

[ ] LMH Housing Benefit

[ ] LMB Buyout

[ ] LMH Down Payment Assistance

Slum and Blight

Does the activity prevent or eliminate Slums or Blighted areas?

(•) No ( ) Yes

[ ] Area Basis

[ ] Spot Basis

Has the proposed project area been officially designed as a slum or blighted area?

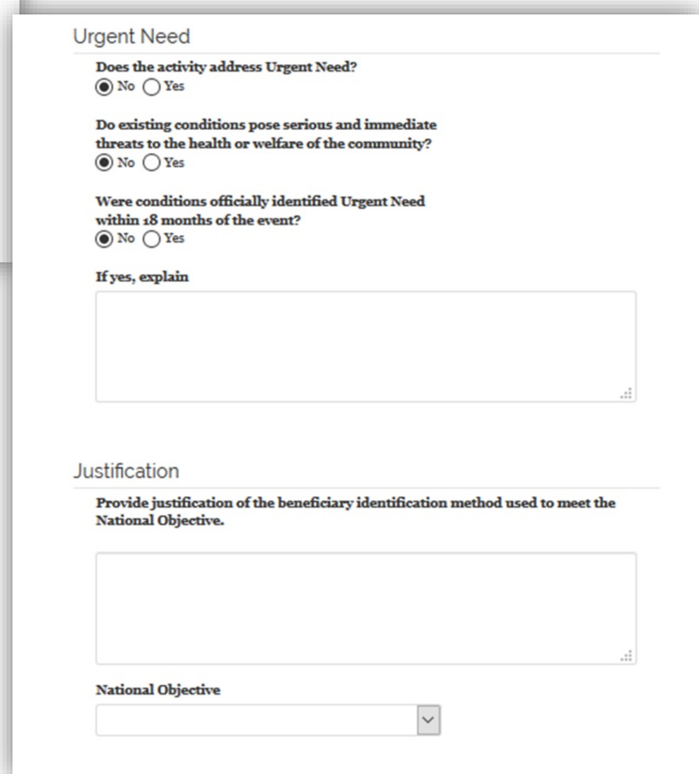
(•) No ( ) Yes

What conditions are present to designate and qualify the area as a slum or blighted area?

Describe the boundaries of the slum or blighted area.

Percent of Deteriorated Buildings in the area, at the time of designation. (enter as decimal value)

Continue to scroll down the window and respond to the questions regarding urgent need, if appropriate for your application. Provide the beneficiary identification method used for your justifications.



Urgent Need

Does the activity address Urgent Need?

(•) No ( ) Yes

Do existing conditions pose serious and immediate threats to the health or welfare of the community?

(•) No ( ) Yes

Were conditions officially identified Urgent Need within 18 months of the event?

(•) No ( ) Yes

If yes, explain

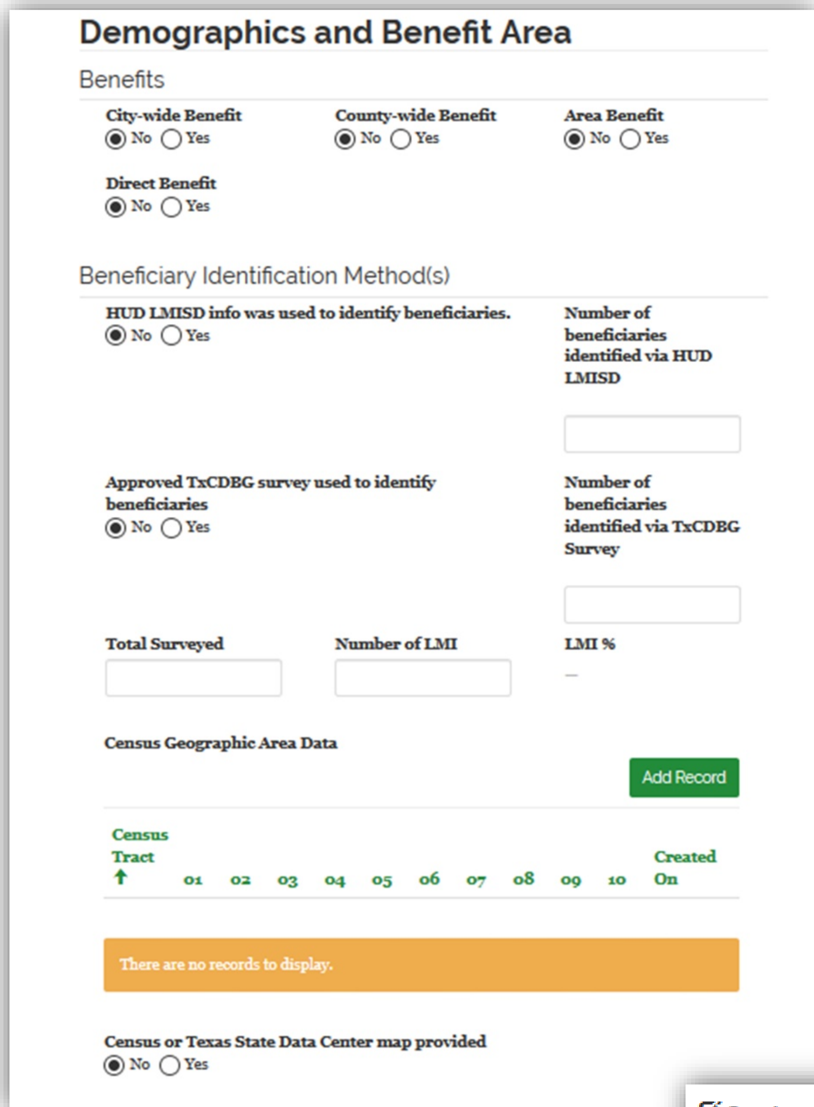
Justification

Provide justification of the beneficiary identification method used to meet the National Objective.

National Objective

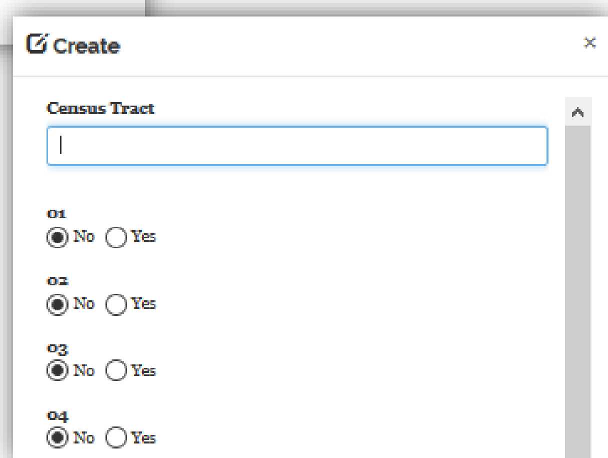
Using the drop-down list box to select among the National Objectives that this application intends to meet. These currently include:

NSP Only-LH-25% Set-Aside
NSP Only-LMMI
NSP Only-LMMJ
RIF
TA
Low/Mod
Slums and Blight
Urgent Need
N/A



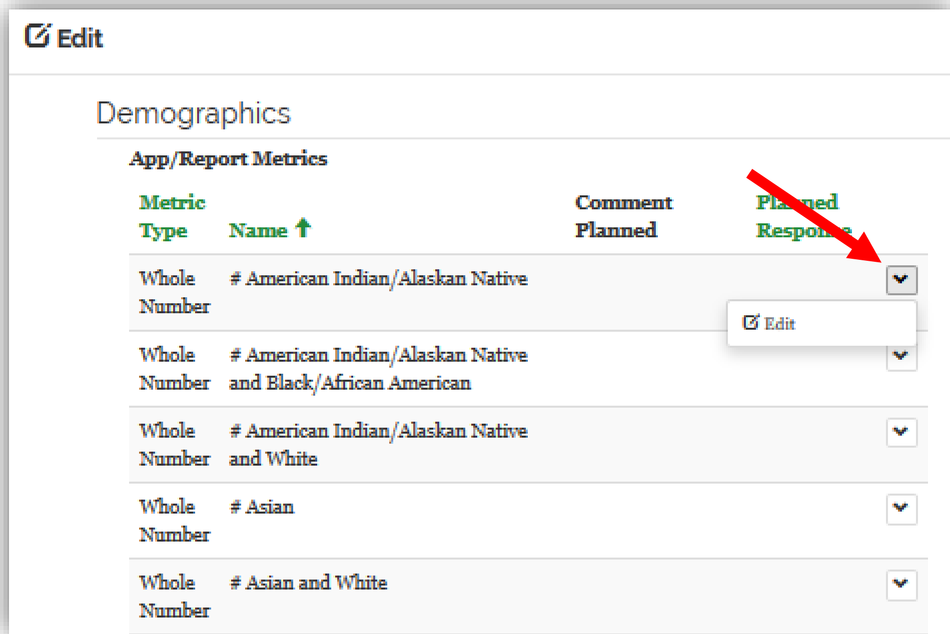
Next enter the demographic information and identify the methods used for identifying beneficiaries.

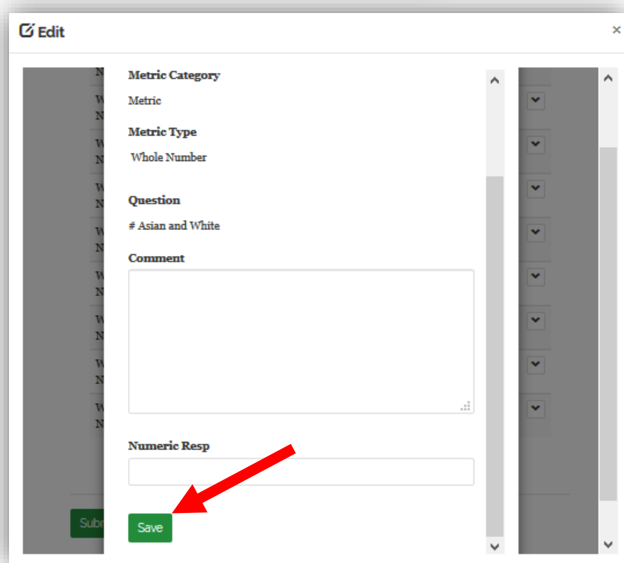
To add information about a census tract, select **Add Record.**



Provide information for the census tract. Repeat this process as required.

The final information requested for this **DRGR Activity** is to respond to the metrics questions on demographics. Select **Edit** next to the metric to which you intend to respond. This will open a new window to allow you to provide your response.





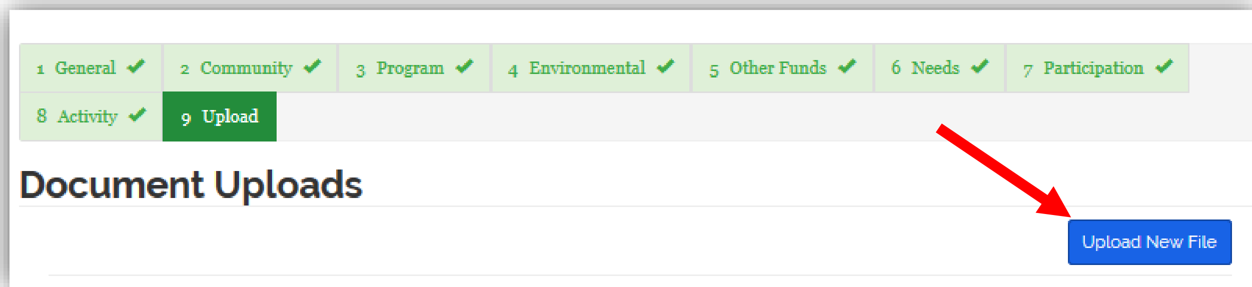
Click on **Save** to close the window and repeat this process for the remaining metric questions.

Once you have completed the metrics section, scroll to the bottom of the window and select **Submit**.

Repeat Step 8 for each proposed DRGR Activity in this application.

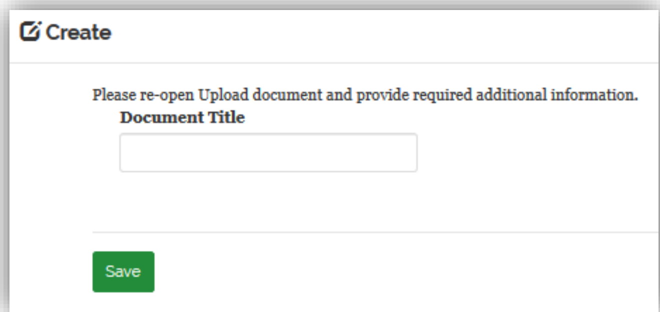
Step 9: Upload Documents

Upload all of the documents that you are required in order to submit this application for review and approval. Select the ***Upload New File*** button at the bottom right of the **Document Uploads** page to begin the process.

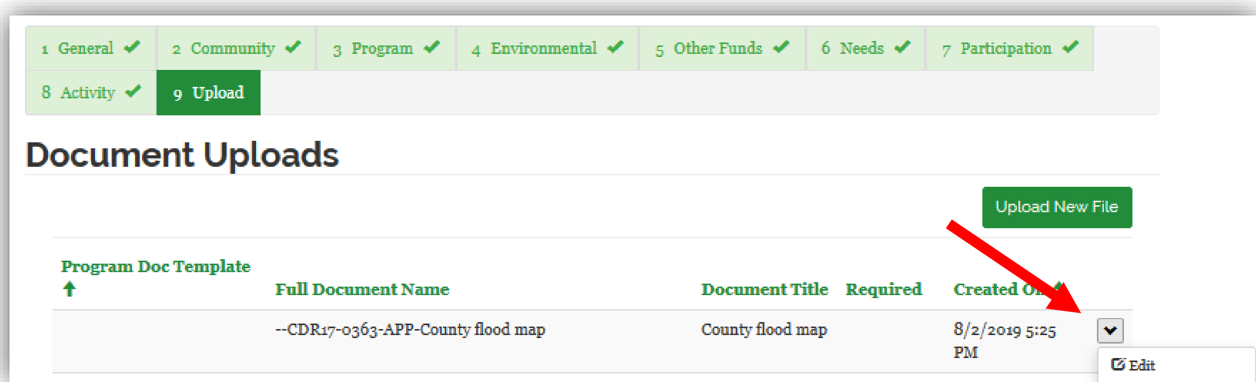


Provide a **Document Title** and select **Save.** Examples of document titles could include:

- Affidavit of Child Support
- Proof of ID – Driver License
- Deed of Title
- County Flood Map

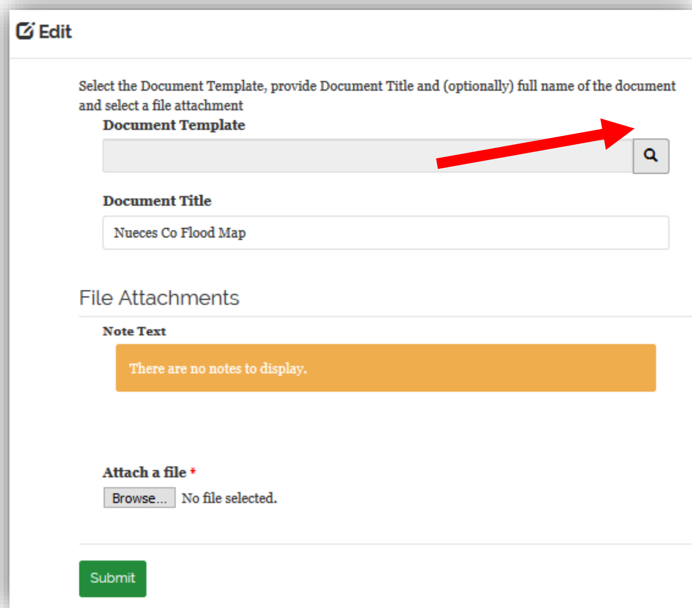


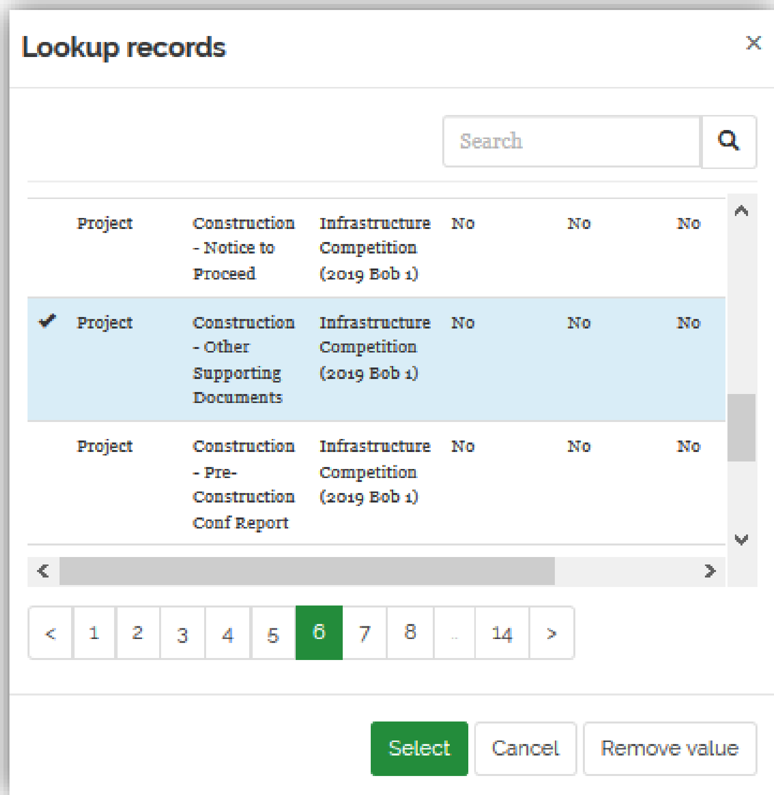
This will return you to the **Document Uploads** page and you should that the system has created a record for your document. To continue, click on the arrow to the right of the record that was created and select **Edit.**



Next, select from among a pre-defined list of **Document Templates**. These templates are just a way to group similar documents. Each program has its own unique set of Document Templates based on the types of activities defined in programs Action Plan.

To select from the list **of Document Templates**, click on the magnifying glass icon.

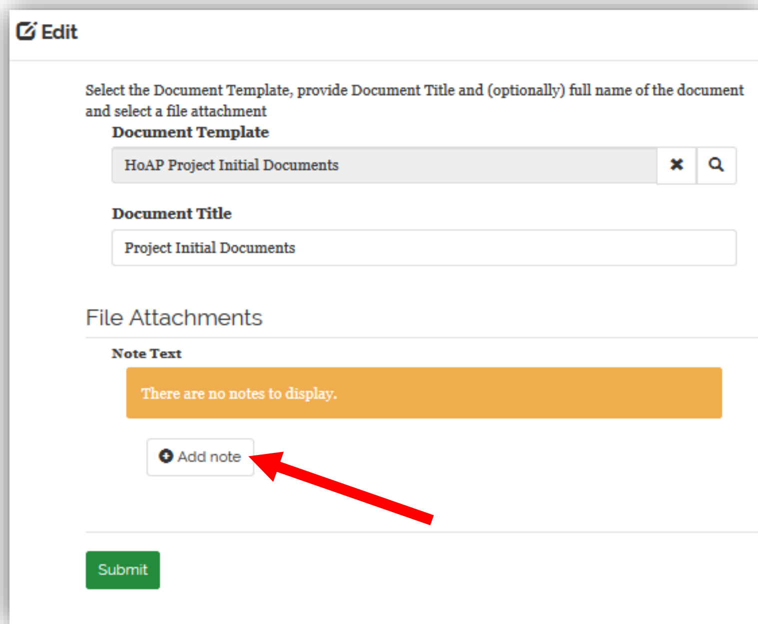




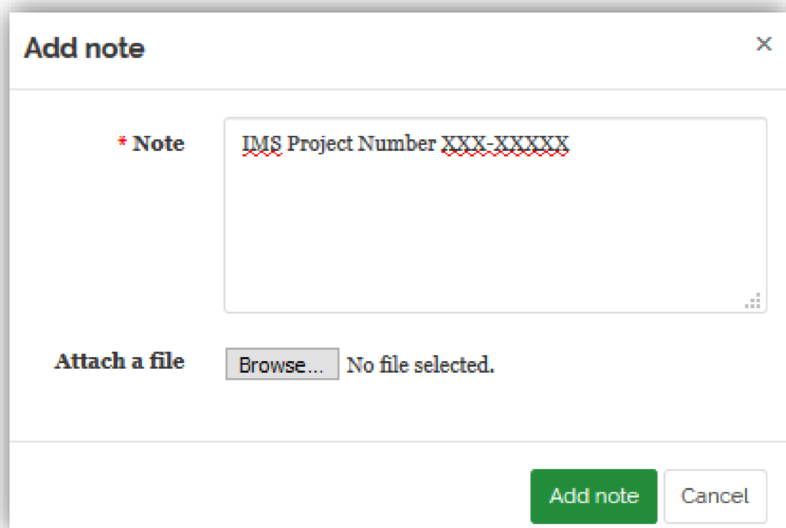
Page through the document types assigned to this Program and select the one most appropriate for the document that you are about to upload. If you have a question regarding the appropriate Document Template, contact your GLO Grant Manager.

Click next to the selected document type and then click **Select** to continue.

Now you can upload the actual document. First click on Add Note to begin.



Include in this field a note that more fully describes the document or clarifies any inconsistencies or questions within the application.



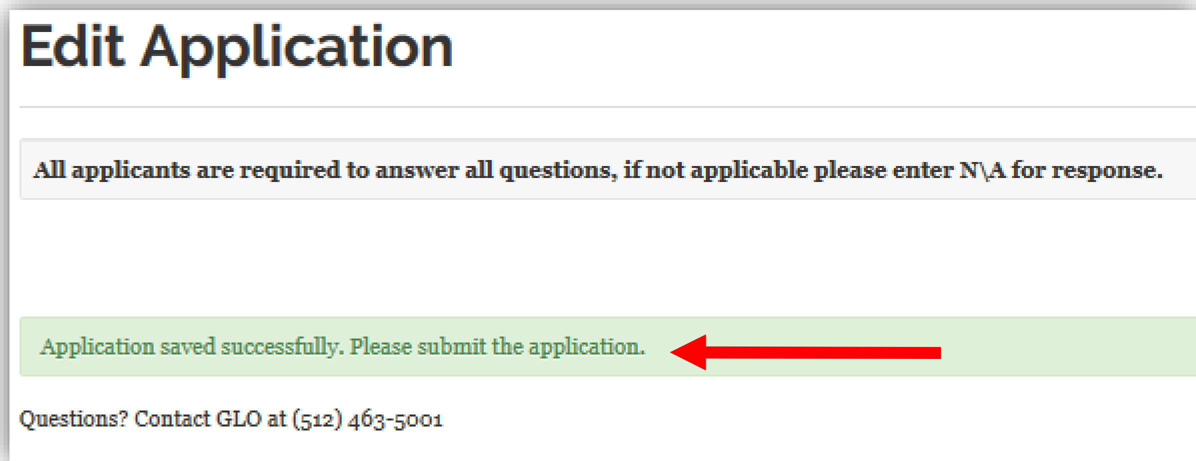
Select the ***Browse*** button and select the file that you wish to upload

Select ***Submit*** to complete the upload

Repeat this process if additional documents are required.

If you have a question about which documents are required for initial submission contact your GLO Grant Manager.

Finally, after uploading all of your documents and selecting **Continue** you will be notified that your application has been saved. However, ***you have not yet submitted your application***.

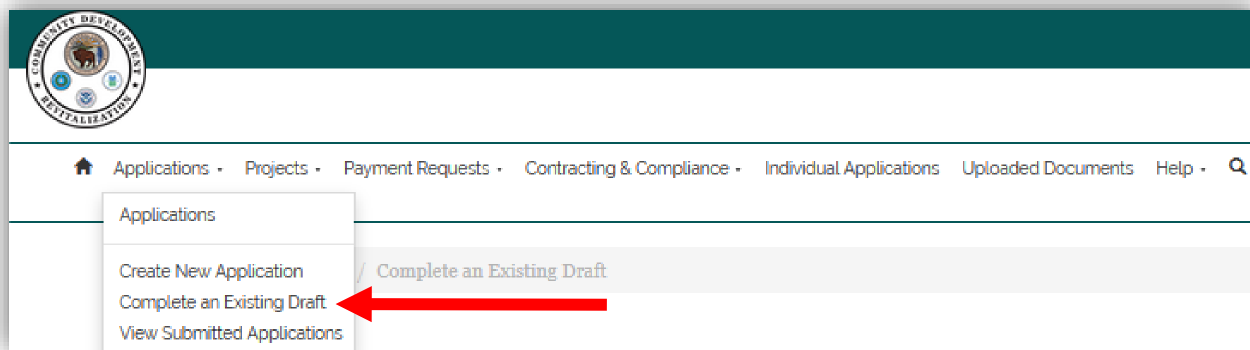


Prior to submitting your application, it will remain in Draft status. You can still make modify most of your application while it is Draft status. However, once you submit the application for review and approval the system will prevent you from making further changes. If you do need to make changes to a submitted application, contact your GLO Grant Manager.

Step 10: Submit the Application

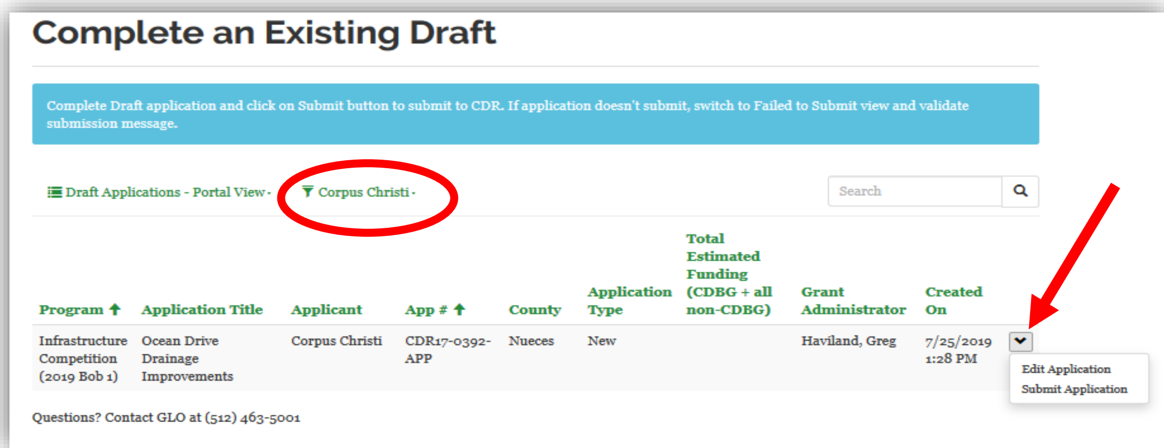
Once the application is complete and you have provided all of the information required to get your application approved, the next step is to formally submit the application.

To submit an application, return to the **Applications Menu** and select **Complete an existing Draft**.



This will open the list of all of your (or your Organization's) draft applications.

Remember that if you are not listed as the **Contact** for this draft application it will not show up under the **My** filter. In this case, change the filter to the **Organization** (in this case Corpus Christi) and your draft application should appear on the list. If you are not seeing the application under either condition, check your profile.



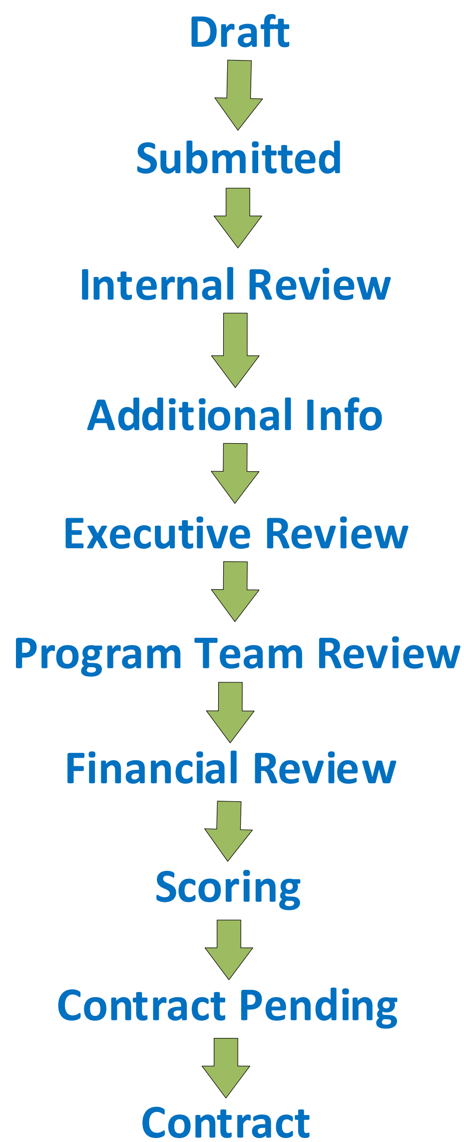
Select the down arrow to the right of your application. You can either **Edit** the draft or **Submit Application** for review and approval. Once you submit the application, you can not alter it unless you contact your Grant Manager.

Status and Stages of Review

As an application moves through the review and approval process, its status changes. An unsubmitted application remains in Draft status. Once it has been submitted, TIGR assigns it to Submitted. From there it goes through formal reviews until it is finally approved and becomes a Contract.

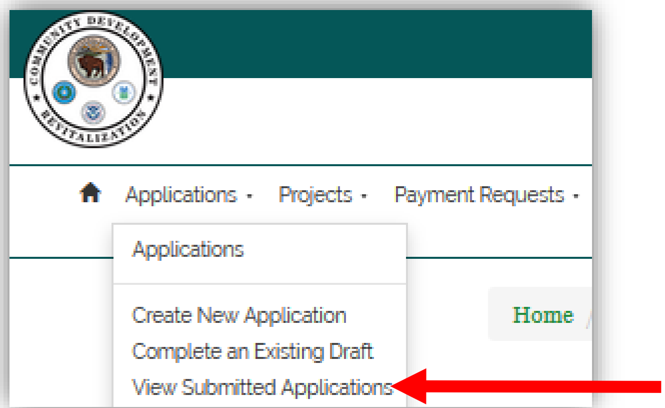
The diagram to the right shows the full end-to-end states of an application in TIGR.

I addition, an application that is no longer being considered can be places into **Withdrawn** or **Closeout** status.

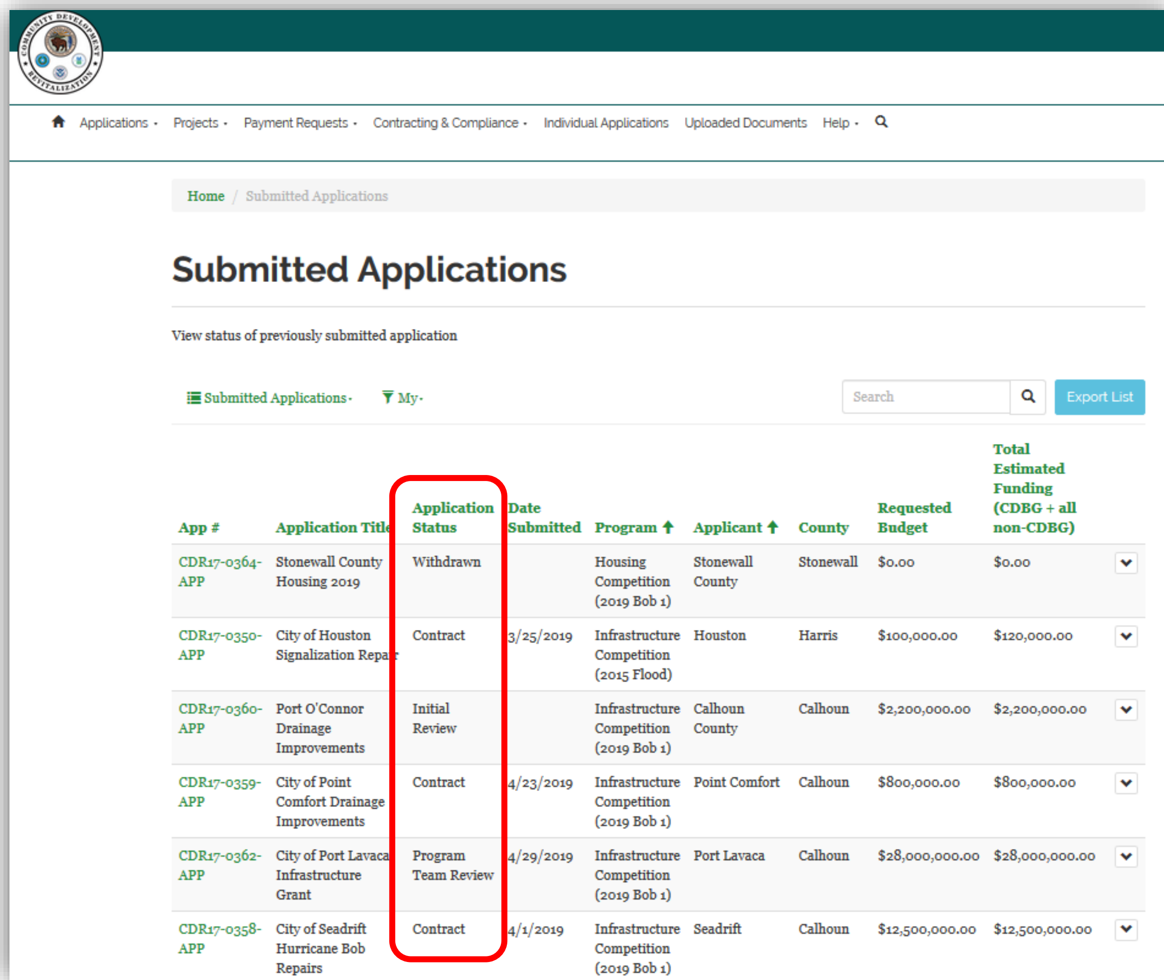


Step 11: Validate Submission

In order to view the current status of your application and to ensure that it has been places into Submitted status, return to the Applications Menu and select View Submitted Applications.



This will bring up a list of all the applications that have been submitted by you or your organization. From here you see the current status and view your application, but you will not be able to alter the application once it has been submitted and it appears in this window.



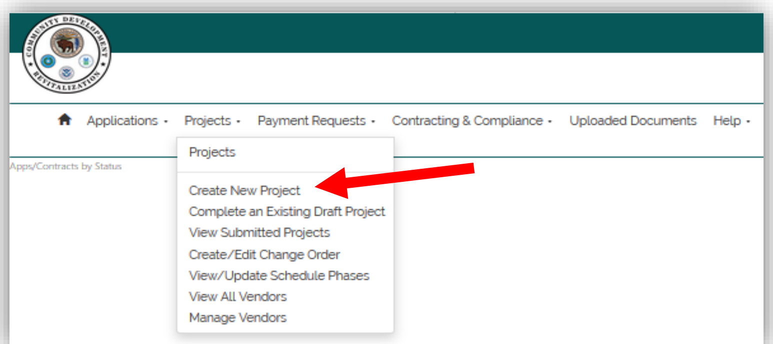
App #	Application Title	Application Status	Date Submitted	Program	Applicant	County	Requested Budget	Total Estimated Funding (CDBG + all non-CDBG)
CDR17-0364-APP	Stonewall County Housing 2019	Withdrawn		Housing Competition (2019 Bob 1)	Stonewall County	Stonewall	$0.00	$0.00
CDR17-0350-APP	City of Houston Signalization Repa	Contract	3/25/2019	Infrastructure Competition (2015 Flood)	Houston	Harris	$100,000.00	$120,000.00
CDR17-0360-APP	Port O'Connor Drainage Improvements	Initial Review		Infrastructure Competition (2019 Bob 1)	Calhoun County	Calhoun	$2,200,000.00	$2,200,000.00
CDR17-0359-APP	City of Point Comfort Drainage Improvements	Contract	4/23/2019	Infrastructure Competition (2019 Bob 1)	Point Comfort	Calhoun	$800,000.00	$800,000.00
CDR17-0362-APP	City of Port Lavaca Infrastructure Grant	Program Team Review	4/29/2019	Infrastructure Competition (2019 Bob 1)	Port Lavaca	Calhoun	$28,000,000.00	$28,000,000.00
CDR17-0358-APP	City of Seadrift Hurricane Bob Repairs	Contract	4/1/2019	Infrastructure Competition (2019 Bob 1)	Seadrift	Calhoun	$12,500,000.00	$12,500,000.00

Chapter 3 - Managing Projects

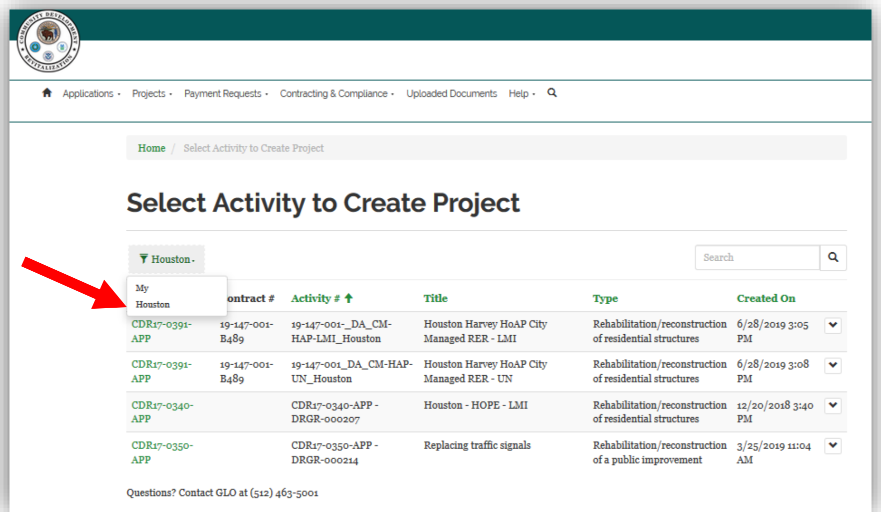
This chapter describes the process for entering, submitting and managing projects in the TIGR Portal. Whereas the creation and submission of an application is a one-time activity, projects have their own lifecycle which may last months or years. This chapter will describe the steps in the Portal that are necessary to enter and maintain projects throughout their duration.

Submitting Projects for Approval

To begin the process of creating a draft project for approval and submission, select the down arrow to the right of **Projects** and select ***Create New Project***. This will open the **Create Project** window**.**



Once you open the **Select DRGR Activity to Create Project** window, you will need to select the DRGR Activity under which this project will be created. The Activity will pull project configuration information form the Program.

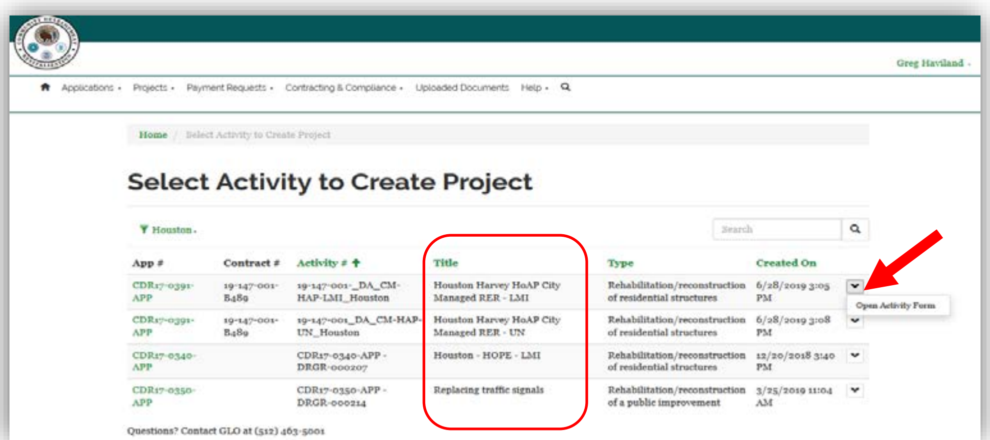


The default filter will be **My**, which displays all the Contracts (Activities) that were entered by your UserID.

Change this filter to ***the Subrecipient.*** To display all the Contracts (Activities) relevant to the Subrecipient.

Find the program name under the Title column.   Select the program with the correct national objective.   Note that there may be similar activities are on different rows and there are multiple pages of programs. You may see the program mentioned but make sure it's not administration or project delivery for the program. Select the correct activity by clicking on the down arrow on the far right of the screen.

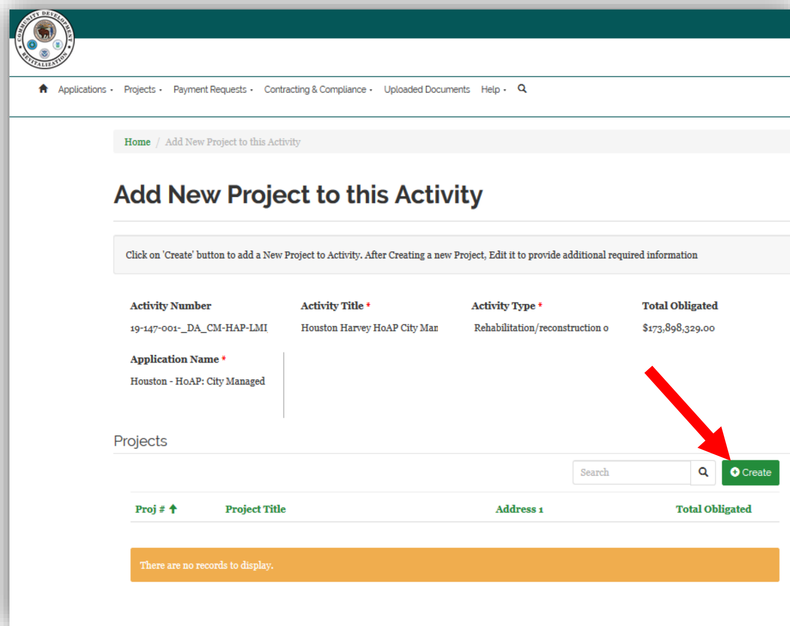
It is critical that you select the correct DRGR Activity. If you are unsure which Activity to select, contact your GLO Grant Manager.



Select the option: ***Open Activity Form***. This will open the **Add New Project** window.

.

From this screen, click on the ***Create*** button, which will open a pop-up window. Enter the fields in this window.



A Note on Program Types:

This process of creating the initial project record will use the DRGR Activity that you initially selected to pull configuration information from the Program that will populate the appropriate sections of the project application, as well as the questions, metrics, milestones, for your project. In the TIGR Portal there are five different Program Types, each of which will require that information that may be unique to that Program Type. The five Program Types currently in the TIGR Portal are:

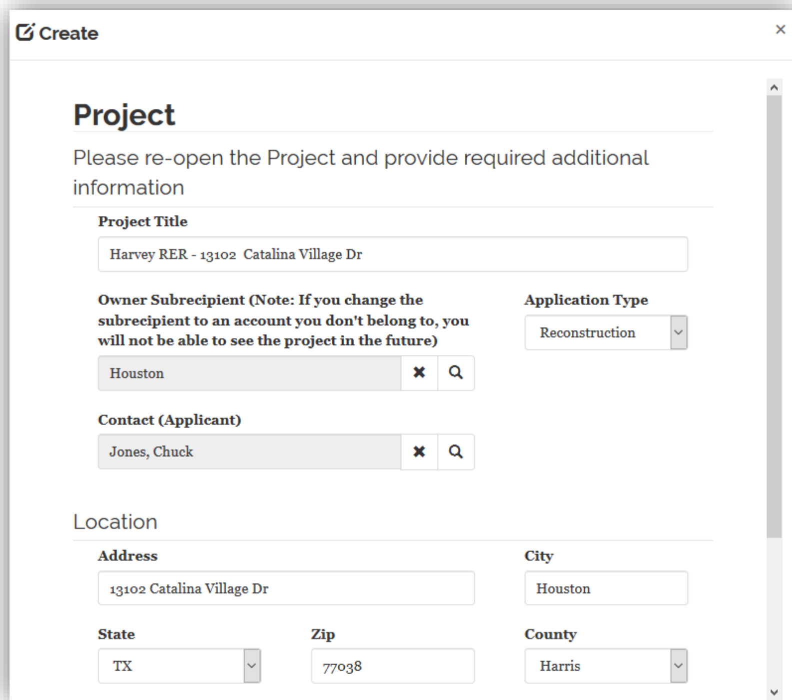
- Housing
- Single Housing
- Multiple Housing
- Infrastructure
- Buyout & Acquisition

There may be additional Program Types added to TIGR and the TIGR Portal in the future.

Step 1: Enter General Information & Location

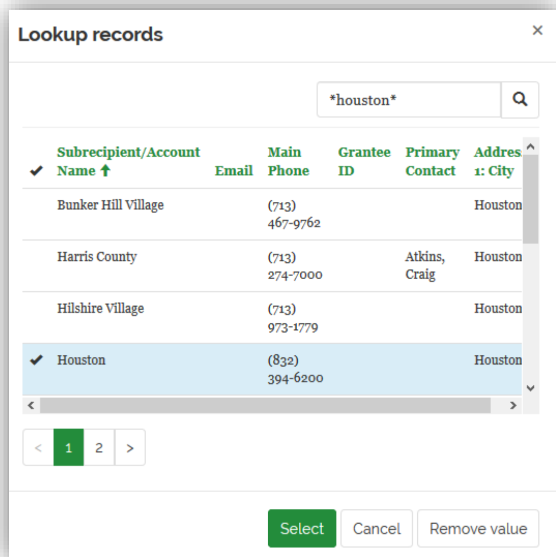
(Required for All Projects)

Enter the information required in this section.



For Project Titles, many programs have a naming convention that is specific to that program. This may include the name of the disaster, the funding source or other information. Ask your Grant Manager if your program has a standard for naming projects

To enter the subrecipient, click on the magnifying glass to begin the search, then execute the following steps:



1) Enter a portion of the subrecipients name such as *Houston* (with asterisks) then click on the magnifying glass icon. This will limit the results to only those entries with 'Houston' in the name.

2) Click on the appropriate line

3) Click on **Select** to complete the selection

TIGR Tip: *If you are presented with a long list of records from which to choose, do a* ***Wildcard Search****. In TIGR, the* *** *symbol acts as a wildcard.*

Example: *If the name you are searching for is "****City of Houston****" rather than scroll through a list of hundreds of names, type* ****Houston**** *(with an Asterix on each end) into the search field and only those names that include the word 'Houston' will appear.* ***This works in ANY search box in TIGR !***

The County defaults to Travis, change it to the correct county for this address.

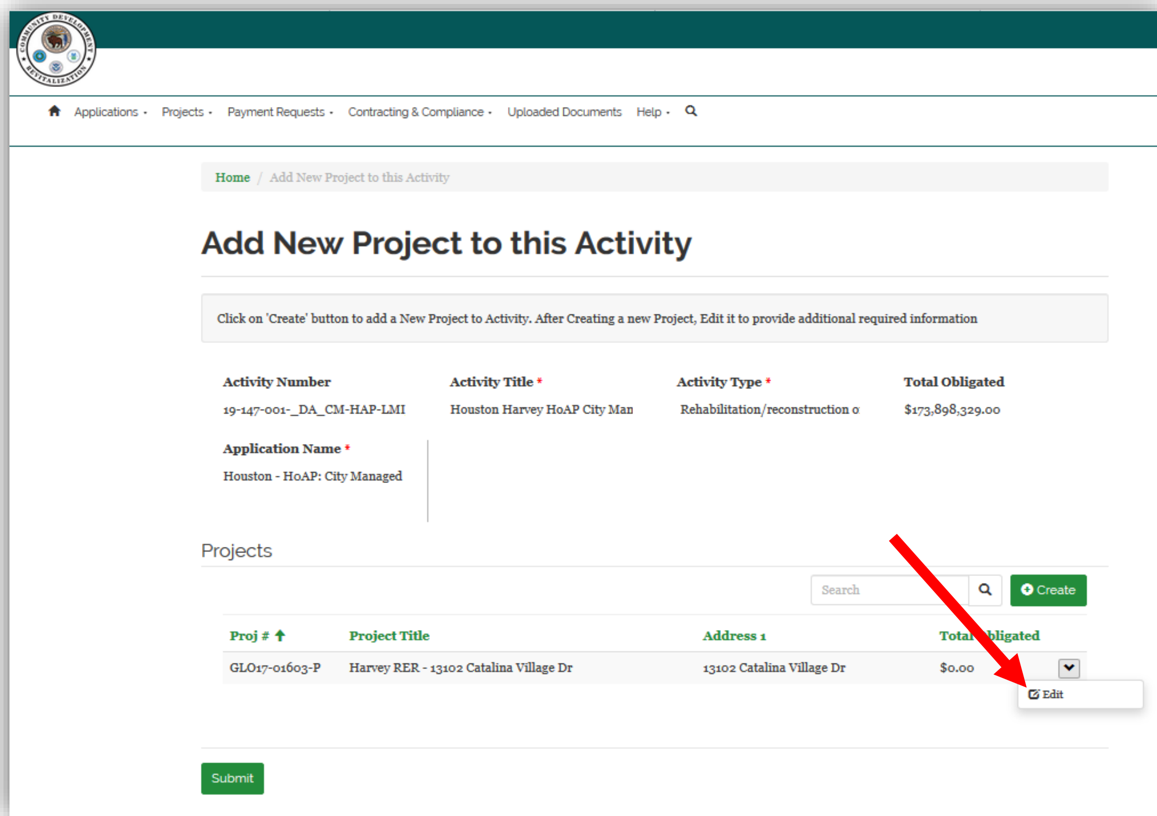
Latitude and longitude must be entered as numeric values (e.g. 30.279, and -97.739). The easiest way to find Lat and Long: use Google Maps and perform a *ctrl + right click* over the location. Lat and Long will appear in a pop-up box along with the address.

This will create a header record for the project. TIGR will automatically close the pop-up window and bring you back to the **Add New Project** page. Your new project should now be displayed.

Step 2: Enter the Project Details

(Required for All Projects)

Creating projects is a two-stage process. Now that the Project Header Record has been created, open the project to provide additional detail. Select **Edit** from the drop-down box to the right of your project.



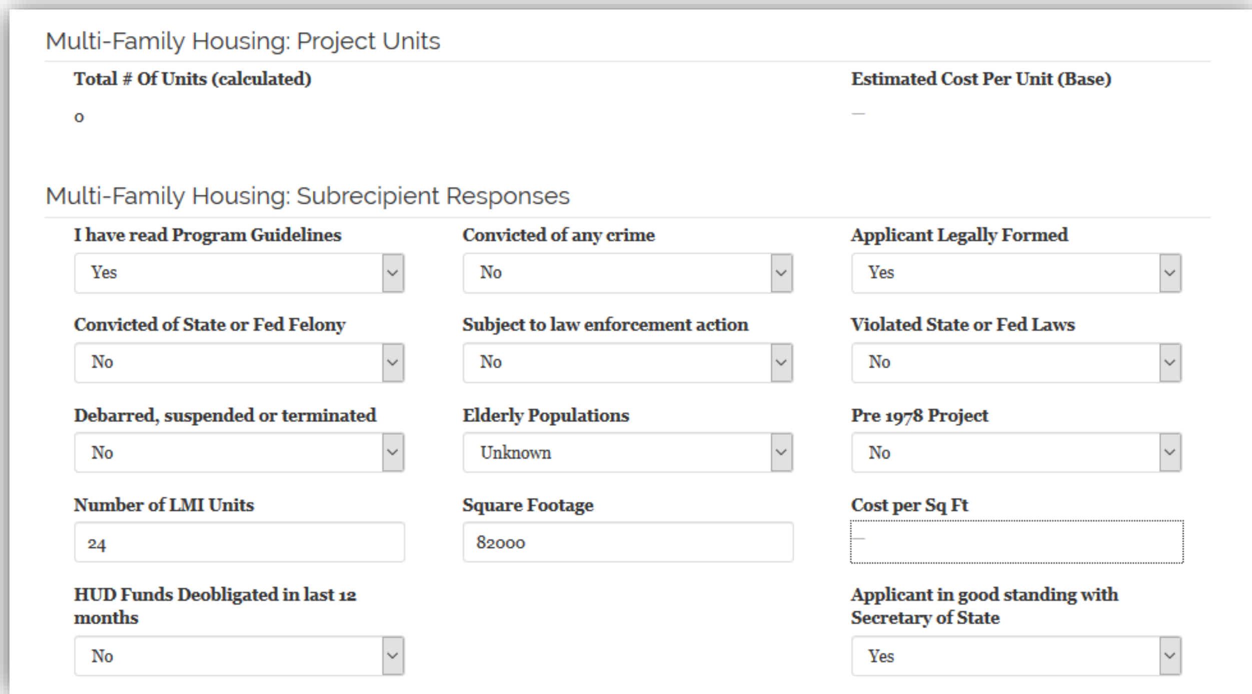
Note: The Project Number has been automatically assigned.

The information that you previously entered to create the record is at the top of this page. Scrolling down, you will find sections that are tailored to the type of project you are entering, based on the Program established in TIGR.

Step 3: Enter Multi-Family Housing Information

(Multi-Family Projects Only)

Enter the required Multi-Family Housing information. Check with your GLO Grant Manager to determine which information must be entered prior to submission.



Multi-Family Housing: Project Units

Total # Of Units (calculated)
0

Estimated Cost Per Unit (Base)
—

Multi-Family Housing: Subrecipient Responses

I have read Program Guidelines
Yes

Convicted of any crime
No

Applicant Legally Formed
Yes

Convicted of State or Fed Felony
No

Subject to law enforcement action
No

Violated State or Fed Laws
No

Debarred, suspended or terminated
No

Elderly Populations
Unknown

Pre 1978 Project
No

Number of LMI Units
24

Square Footage
82000

Cost per Sq Ft
—

HUD Funds Deobligated in last 12 months
No

Applicant in good standing with Secretary of State
Yes

Total # of Units (calculated) and **Estimated Cost Per Unit (Base)** are calculated by the TIGR system once the project has been approved: these fields are display only.

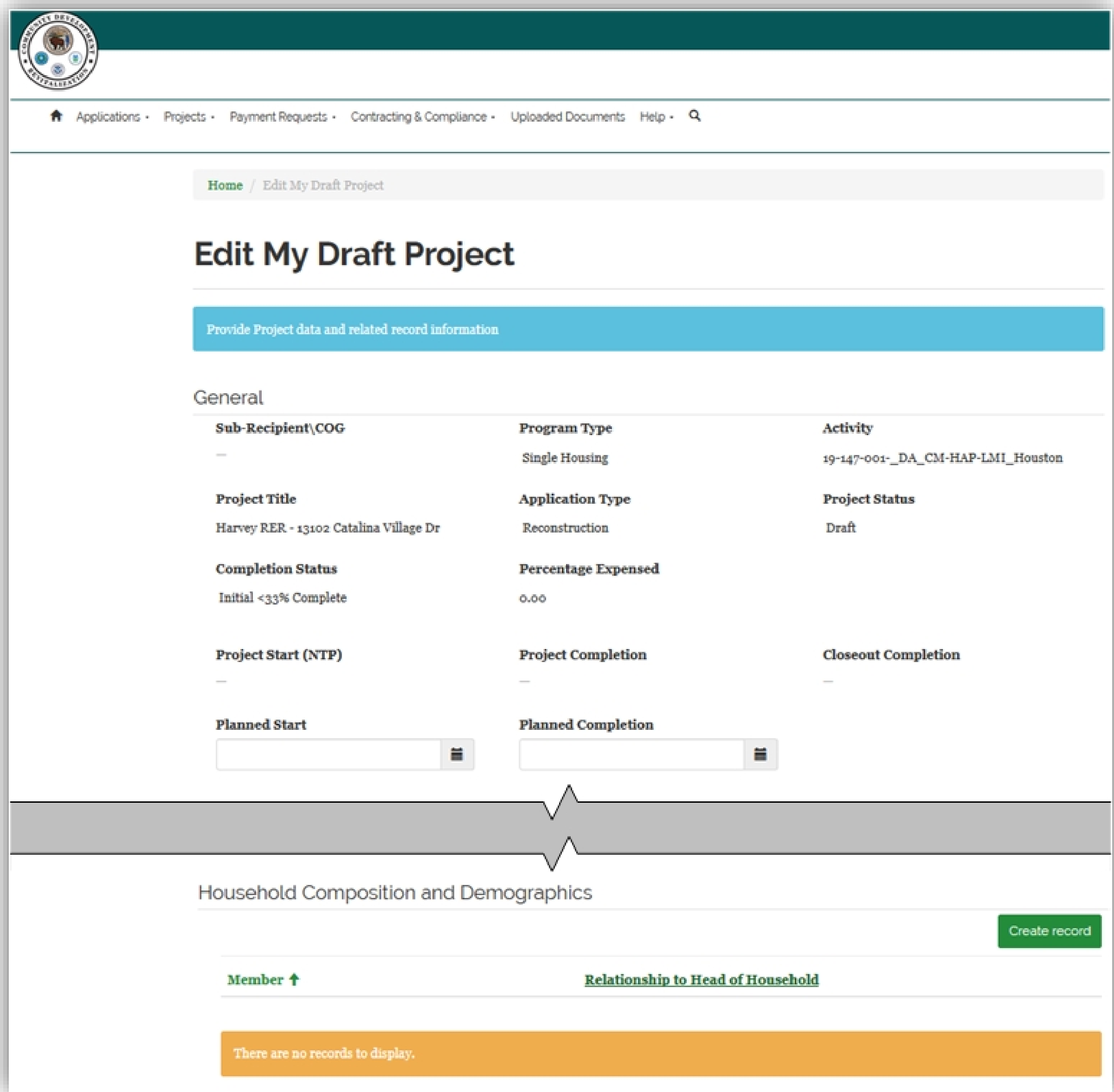
Respond to the remaining questions in the Multi-Family section.

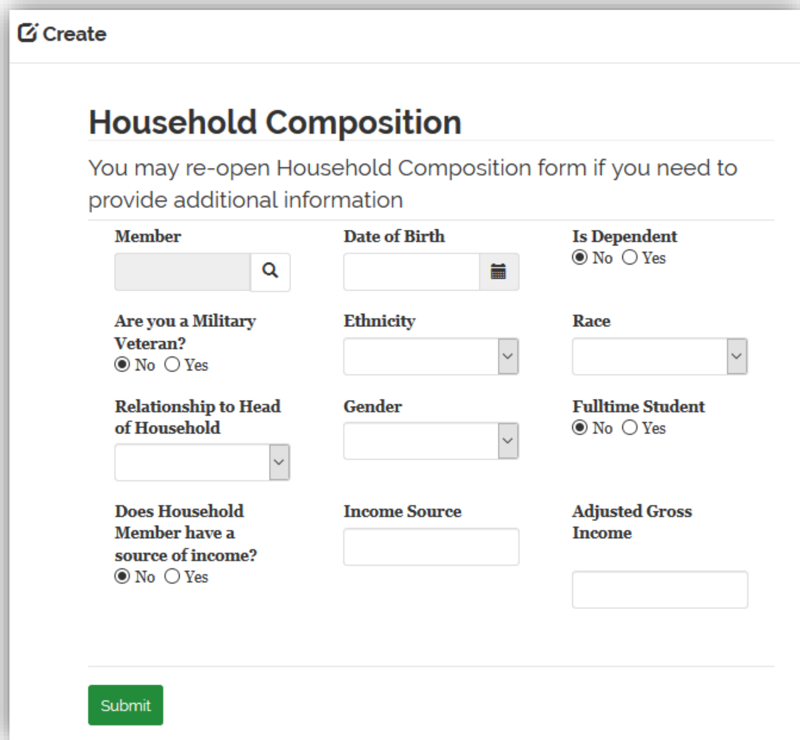
Cost per Sq Ft is another field that is calculated by TIGR after a project is approved and it is display only.

Step 4: Enter the Household Composition and Demographics

(Housing, Single Housing, Buyout & Acquisition & Multi-Family Projects)

Enter the required Household Composition and Demographics information by clicking on the **Create Record** button in that section of the page.

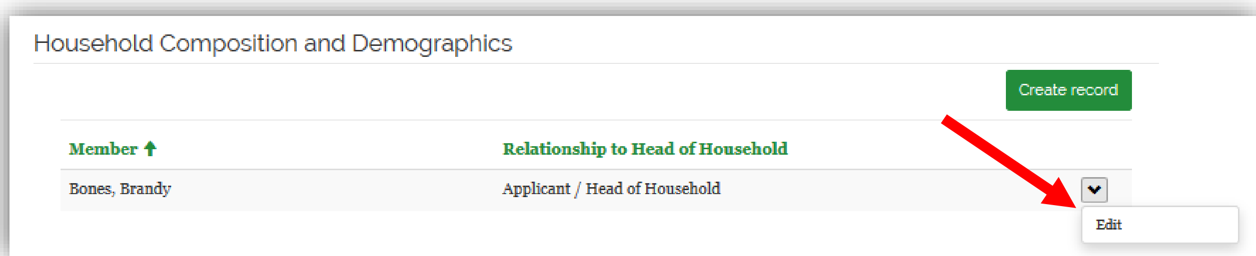




An applicant may already be in the system if they have applied previously for another program, but most of the time you will need to enter their information.

Click **Submit** when complete.

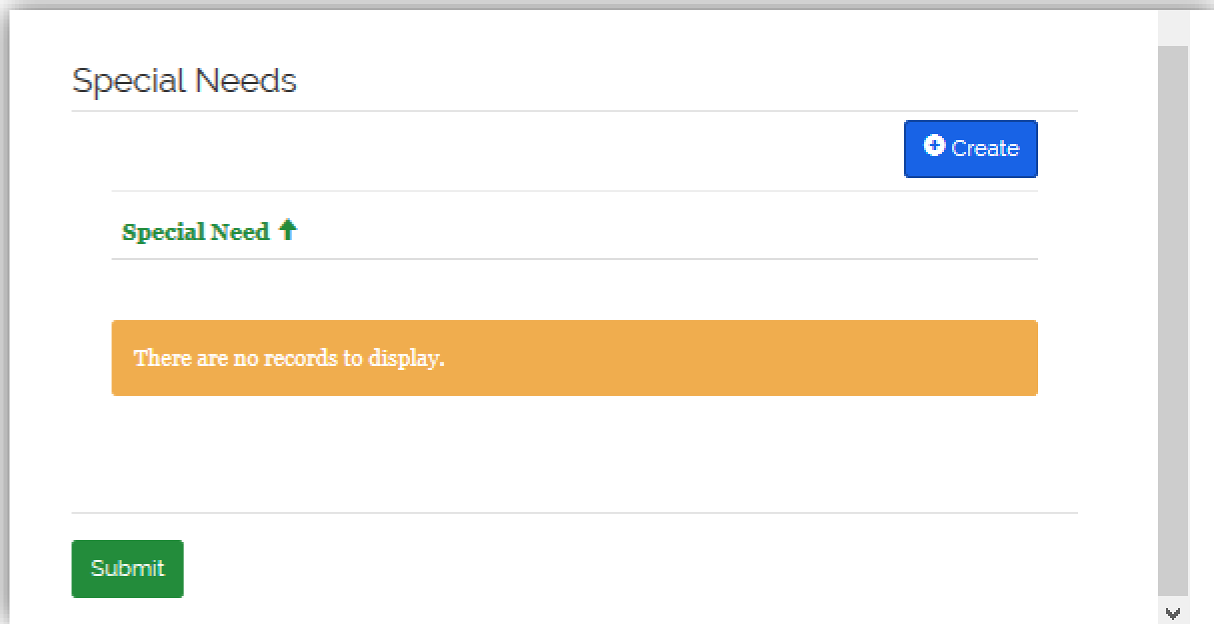
Reopen the Member Record by clicking on the caret (down arrow) to the left of the entry.



At the bottom of the Pop-Up Box, a section will appear allowing you to enter any special needs that apply to this Household Member. These may include

- Elderly
- Disability
- Colonia Resident
- Homeless
- Migrant Farm Worker
- Public Housing Resident
- Wounded Warrior

If an applicant has more than one Special Need, repeat this process by re-selecting the Create button.

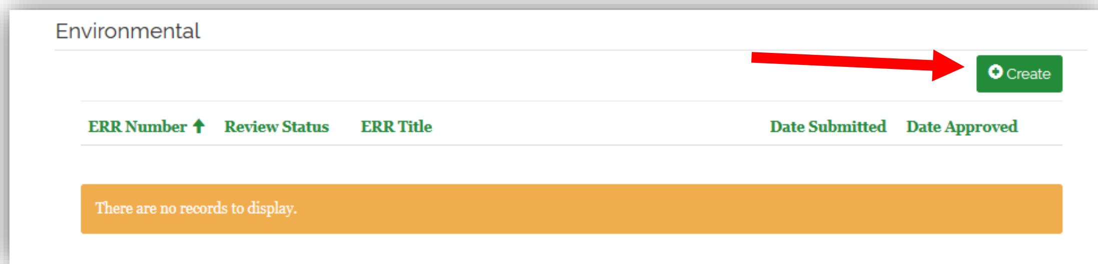


Repeat this Step for each member of the household.

Step 5: Enter Environmental Information

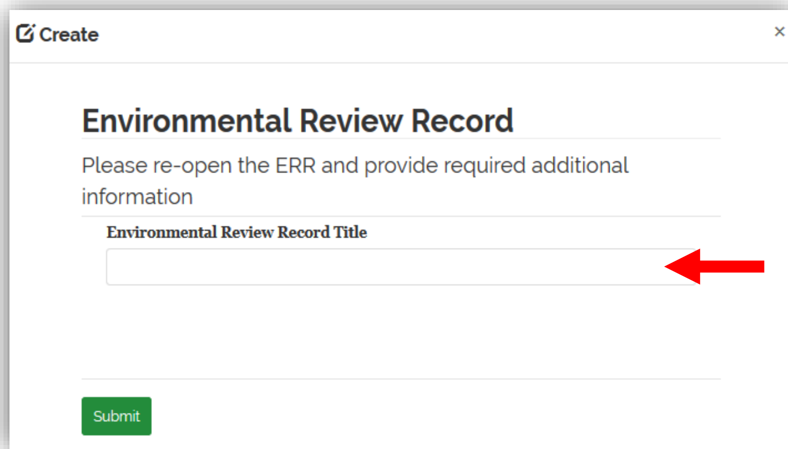
(All Projects)

Your program may or may not require that an environmental review be completed before the project can be submitted. All will require that a review of some kind be performed before the

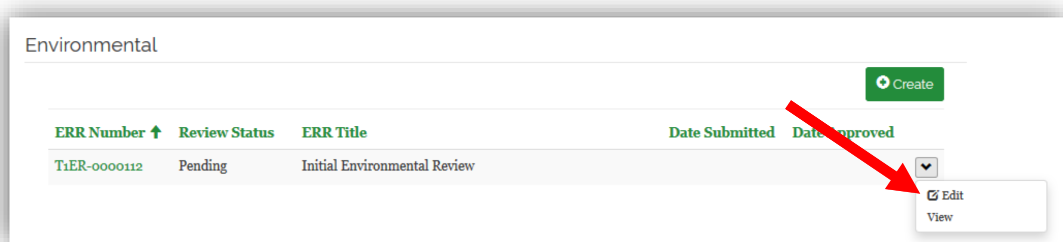


project can be approved. Regardless of when you enter it, begin by clicking on the **Create** button in the Environmental section of this page.

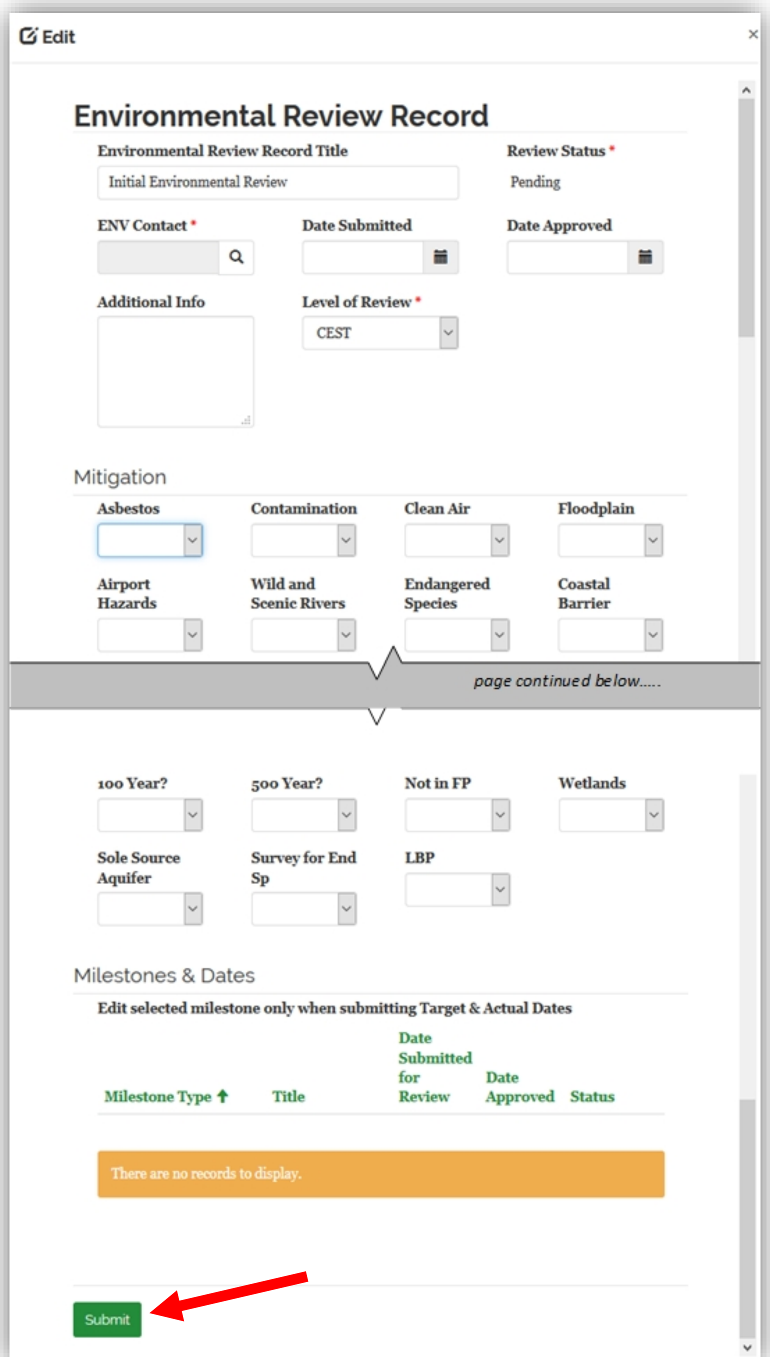
Provide a title for this ERR and select **Submit**.



Now that you have given the ERR a title, you will need to provide the detailed information for this record. Begin by selecting Edit from the right side of the ERR listed below.



Respond to the questions for this ERR. At a minimum you must select the Environmental Contact for the Subrecipient and the Level of Review for this ERR.



If the individual that you would like to name as the Environmental Contact is not in the TIGR list, contact your Grant Manager.

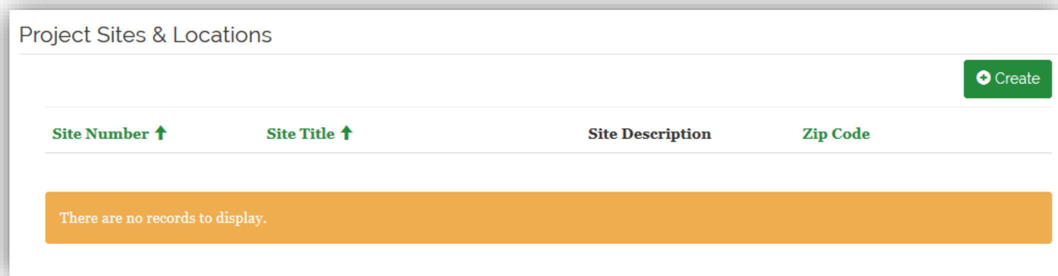
You may not have environmental milestones at this point in the project. You can return to this record and review these later in the project.

Click on **Submit** when you are ready to save this information and move on to the next section.

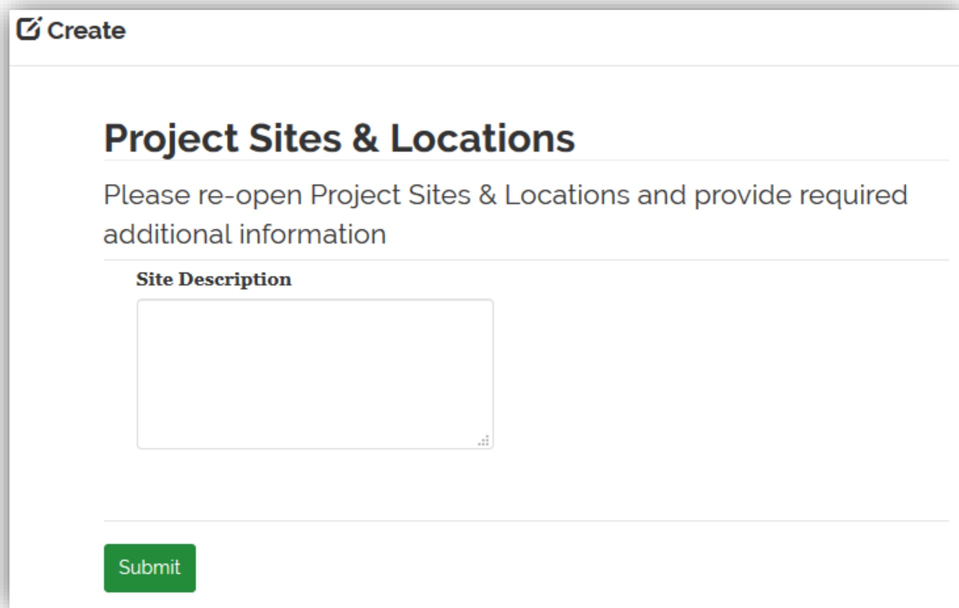
Step 6: Enter Project Sites & Locations

(All Projects)

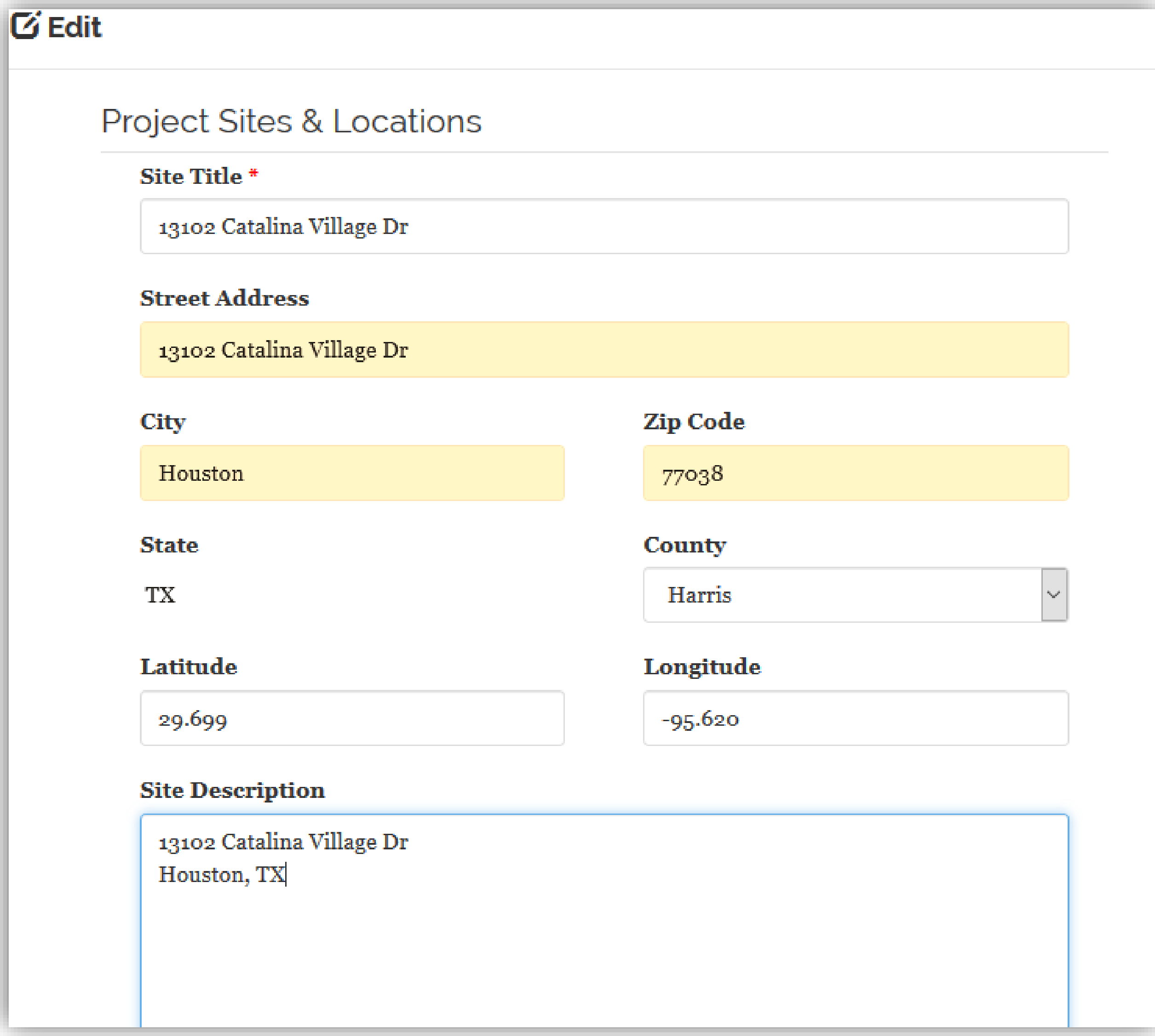
If your project has more than one site, you will need to enter the additional sites to locations in this section. To enter the site and location information, first click on the **Create** button in that section.



Provide a site description for this project title and select **Submit**. You can use the project address in this field.



Re-open the project site. Enter the location for this project. Remember that Lat and Long should be entered as decimals.



Contact your Grant Manager to determine if the Program for which you are applying requires that you enter information on the elected officials at this location.

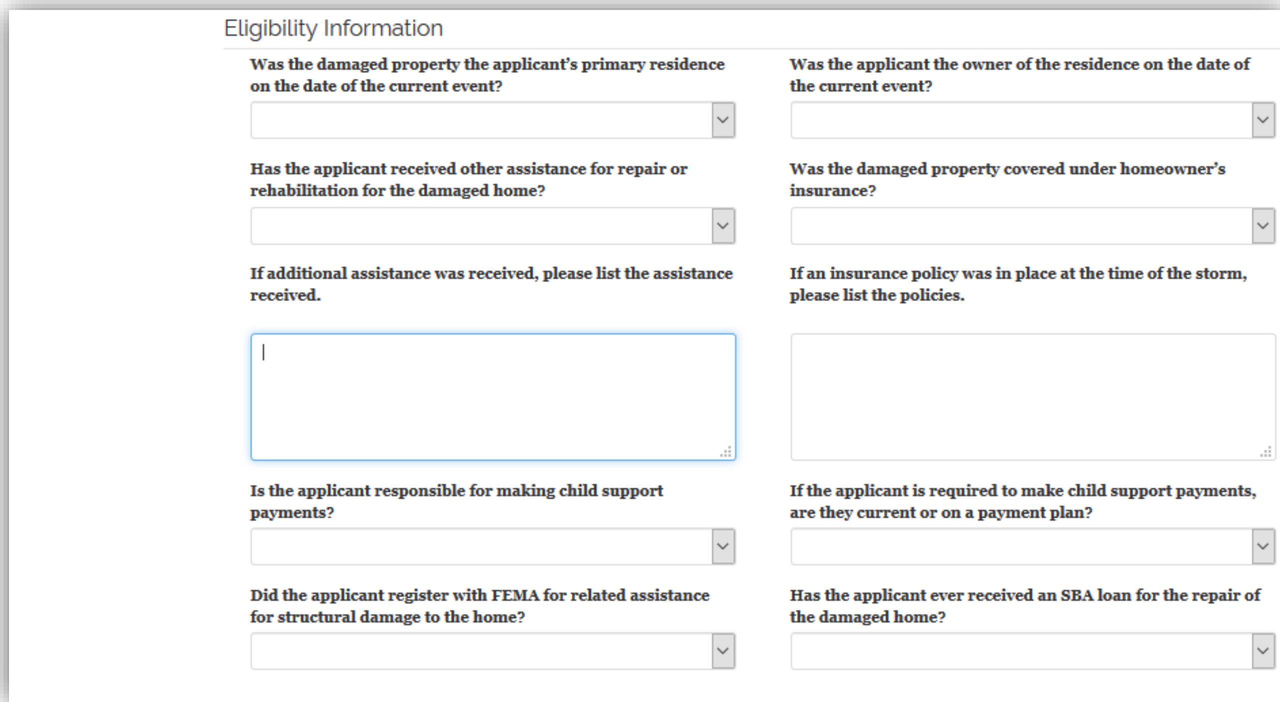
Select **Submit** to return to the **Edit My Draft Project** screen.

For single-family houses, there will generally be only one location. If there are multiple locations, repeat this step and enter site information for each location.

Step 7: Respond to Eligibility Questions

(Housing, Single Housing, Buyout & Acquisition and Multi-Family Projects)

Respond to ALL the eligibility questions. The first four and the last four questions allow one of these possible responses: ***Yes, No, N/A*** or ***Unknown***. The remaining two questions are free-form text fields; if they are not applicable, state this.


Eligibility Information

Was the damaged property the applicant's primary residence on the date of the current event?

Was the applicant the owner of the residence on the date of the current event?

Has the applicant received other assistance for repair or rehabilitation for the damaged home?

Was the damaged property covered under homeowner's insurance?

If additional assistance was received, please list the assistance received.

If an insurance policy was in place at the time of the storm, please list the policies.

Is the applicant responsible for making child support payments?

If the applicant is required to make child support payments, are they current or on a payment plan?

Did the applicant register with FEMA for related assistance for structural damage to the home?

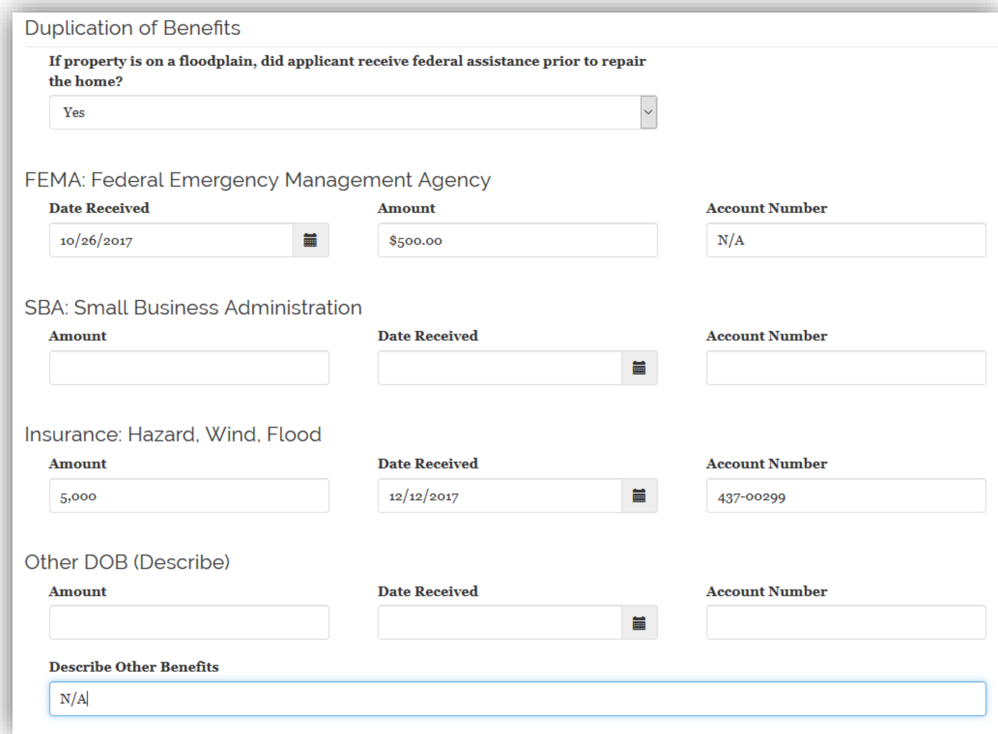
Has the applicant ever received an SBA loan for the repair of the damaged home?

TIGR Tip: *It is a really good idea to periodically save the project information as you are entering it. Scroll to the bottom of the page and select the* ***Save Project*** *button. After saving you can continue to enter project information.*

Step 8: Enter Duplication of Benefits Information

(Housing, Single Housing, Buyout & Acquisition and Multi-Family Projects)

Respond to ALL the duplication of benefits questions. If they are not applicable, state this.


Duplication of Benefits

If property is on a floodplain, did applicant receive federal assistance prior to repair the home?

Yes

FEMA: Federal Emergency Management Agency

Date Received	Amount	Account Number
10/26/2017	$500.00	N/A

SBA: Small Business Administration

Amount	Date Received	Account Number

Insurance: Hazard, Wind, Flood

Amount	Date Received	Account Number
5,000	12/12/2017	437-00299

Other DOB (Describe)

Amount	Date Received	Account Number

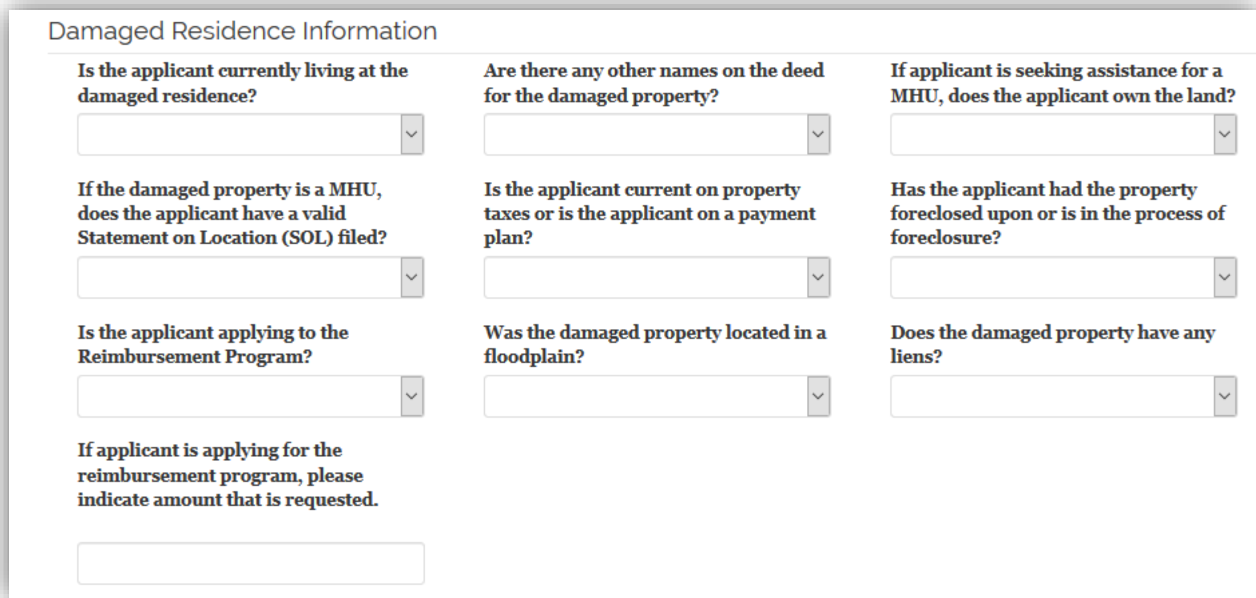
Describe Other Benefits

N/A

Step 9: Enter Damaged Residence Information

(Housing, Single Housing, Buyout & Acquisition and Multi-Family Projects)

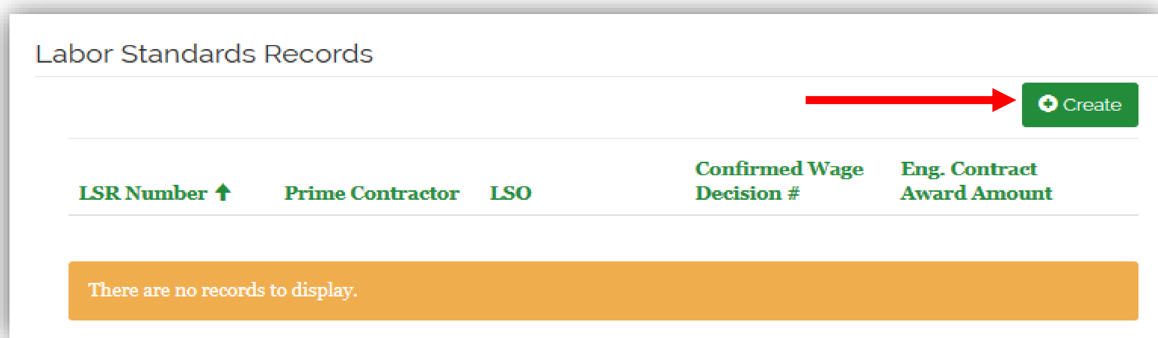
Respond to All the damaged residence questions. If they are not applicable, state this.



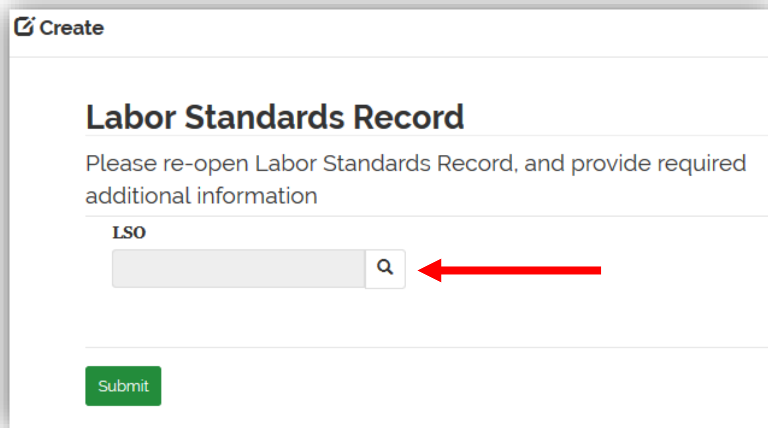
Step 10: Enter Labor Standards Records

(Infrastructure Projects Only)

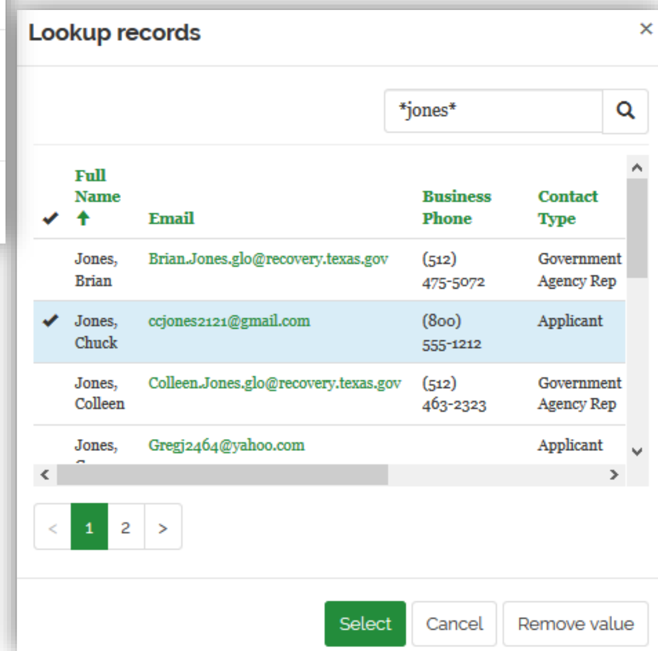
If labor Standards Reporting is required for your project begin the process by creating a labor Standards Record. Under the Labor Standards section click on **Create** to begin the process.



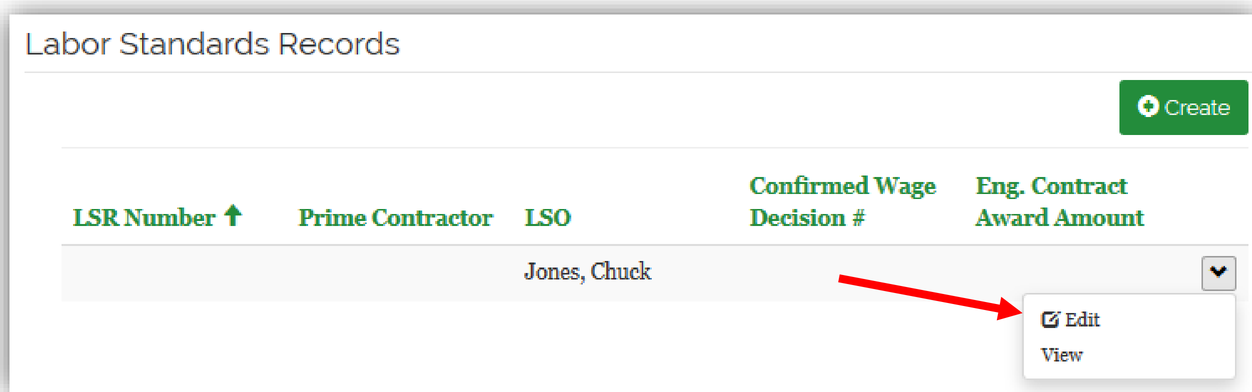
The appointed Labor Standards Officer (LSO) is assigned to oversee the labor portion of the contract and will be responsible for assuring compliance with all of the reporting requirements.

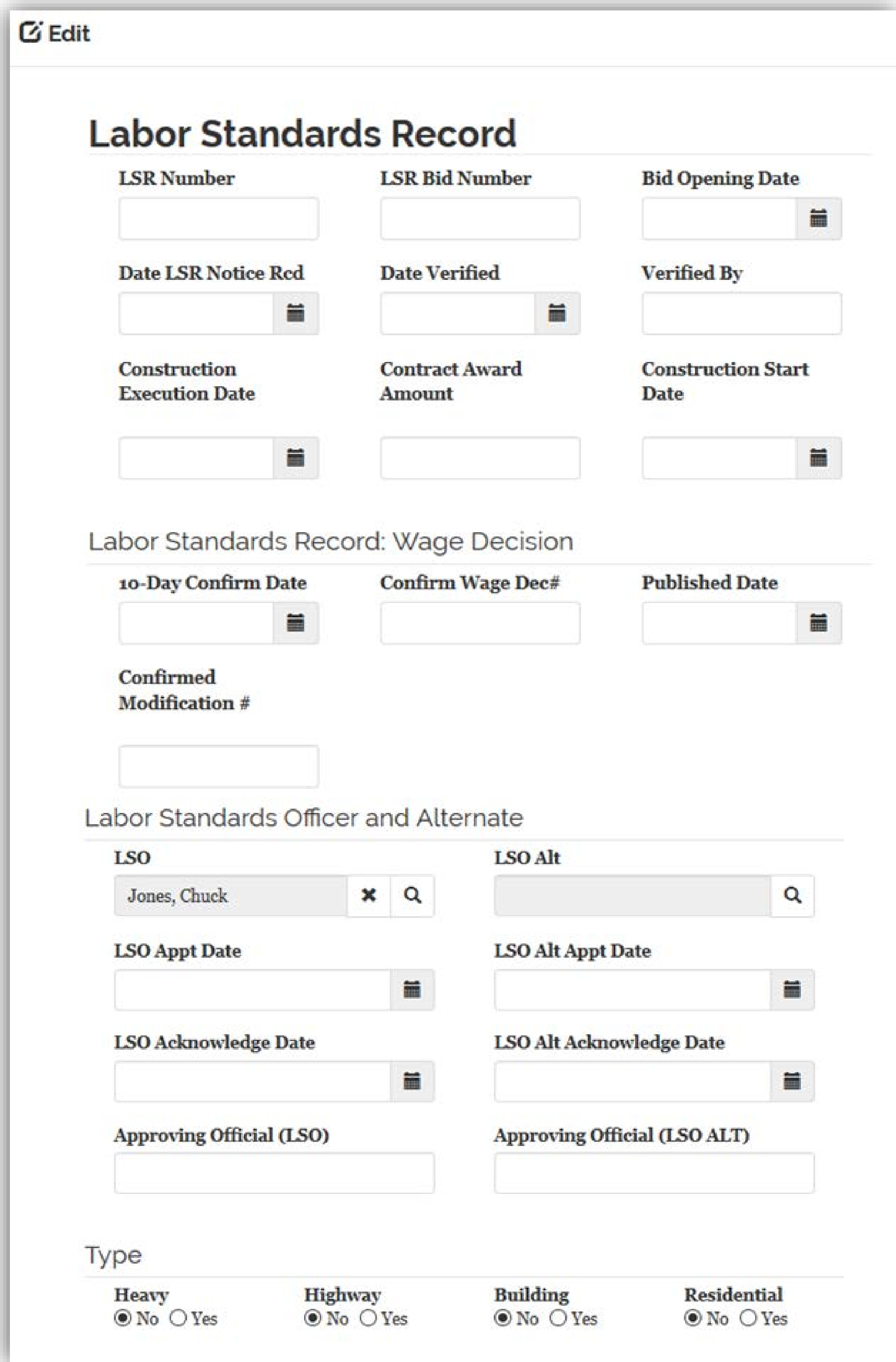


Click on the lookup icon and then search for and choose the LSO for this project. Click on **Select** when you are done.



Now that you have created the basic Labor Standards record, open it back up by selecting Edit to enter the remaining information.





Edit

Labor Standards Record

LSR Number

LSR Bid Number

Bid Opening Date

Date LSR Notice Rcd

Date Verified

Verified By

Construction Execution Date

Contract Award Amount

Construction Start Date

Labor Standards Record: Wage Decision

10-Day Confirm Date

Confirm Wage Dec#

Published Date

Confirmed Modification #

Labor Standards Officer and Alternate

LSO

Jones, Chuck

LSO Alt

LSO Appt Date

LSO Alt Appt Date

LSO Acknowledge Date

LSO Alt Acknowledge Date

Approving Official (LSO)

Approving Official (LSO ALT)

Type

Heavy
No Yes

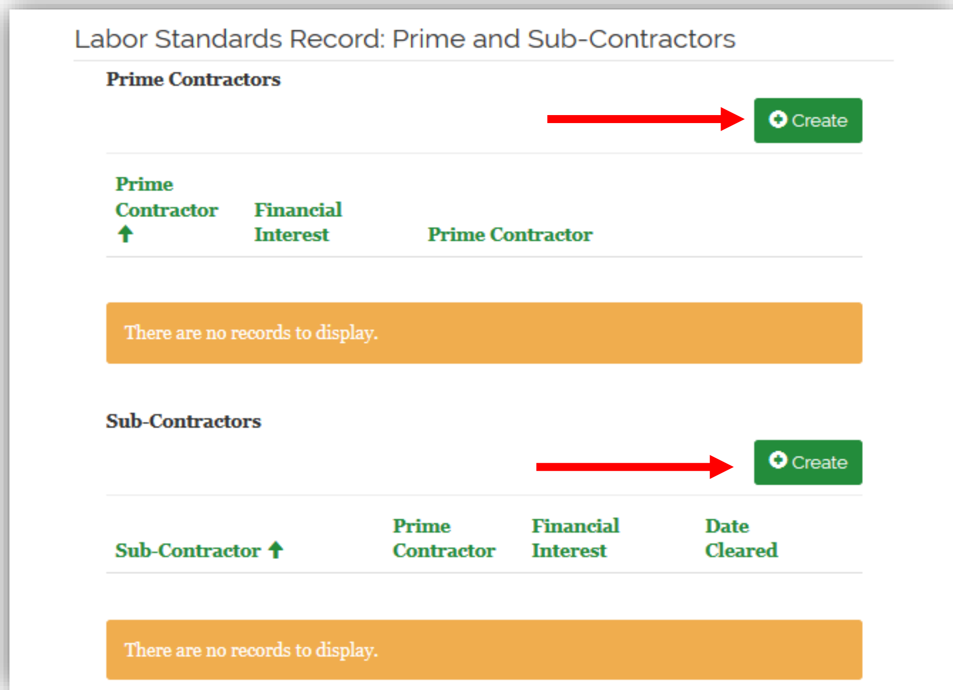
Highway
No Yes

Building
No Yes

Residential
No Yes

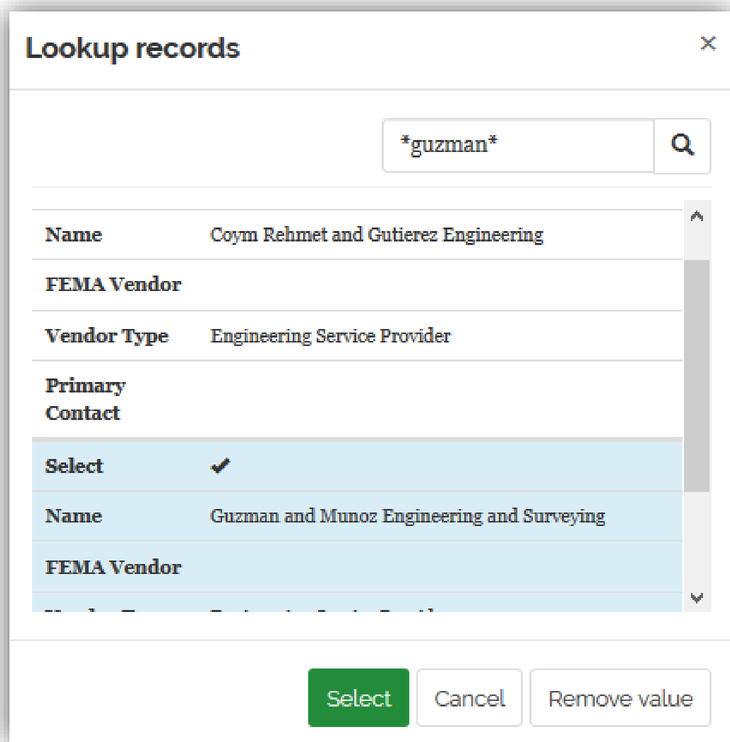
To identify the Prime and Sub-Contractors click on the Create buttons to select either or both of these.

4



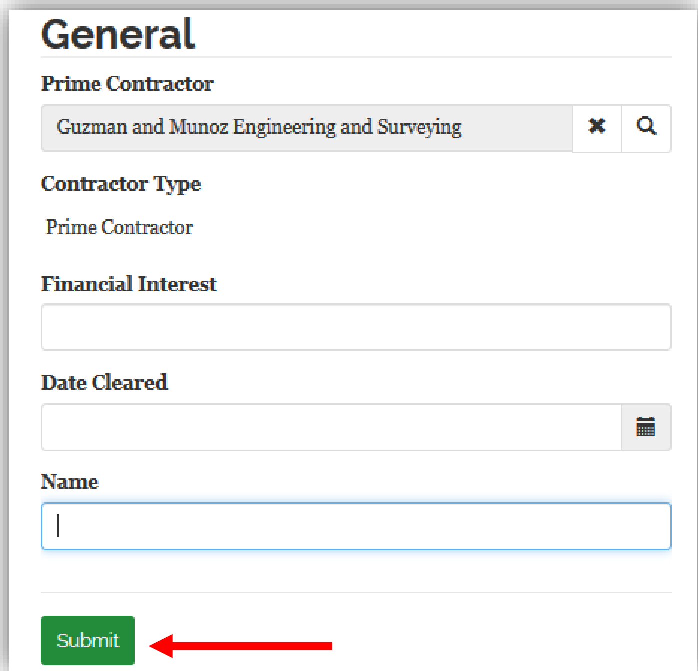
Search for and select the prime and subs from the vendor list.

There are hundreds of vendors in TIGR; use wildcard searching to find the vendor more easily.



Enter the information that may be required for each contractor as required.

Click on **Submit** when you done.



General

Prime Contractor

Guzman and Munoz Engineering and Surveying

Contractor Type

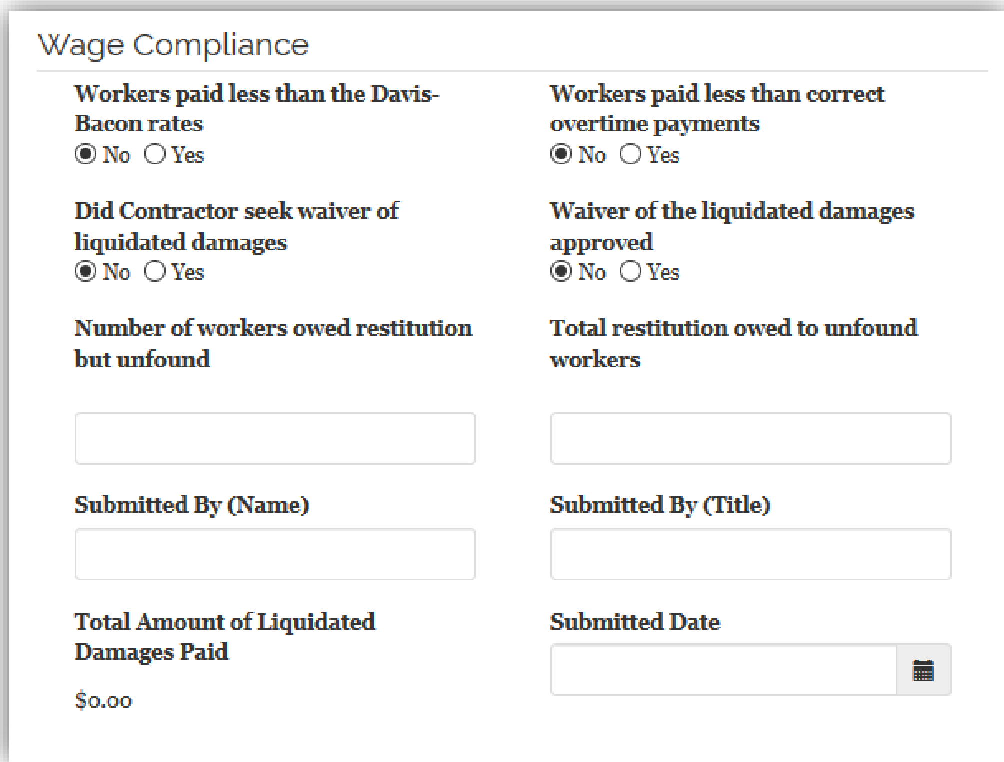
Prime Contractor

Financial Interest

Date Cleared

Name

Submit



Wage Compliance

Workers paid less than the Davis-Bacon rates

(●) No ( ) Yes

Workers paid less than correct overtime payments

(●) No ( ) Yes

Did Contractor seek waiver of liquidated damages

(●) No ( ) Yes

Waiver of the liquidated damages approved

(●) No ( ) Yes

Number of workers owed restitution but unfound

Total restitution owed to unfound workers

Submitted By (Name)

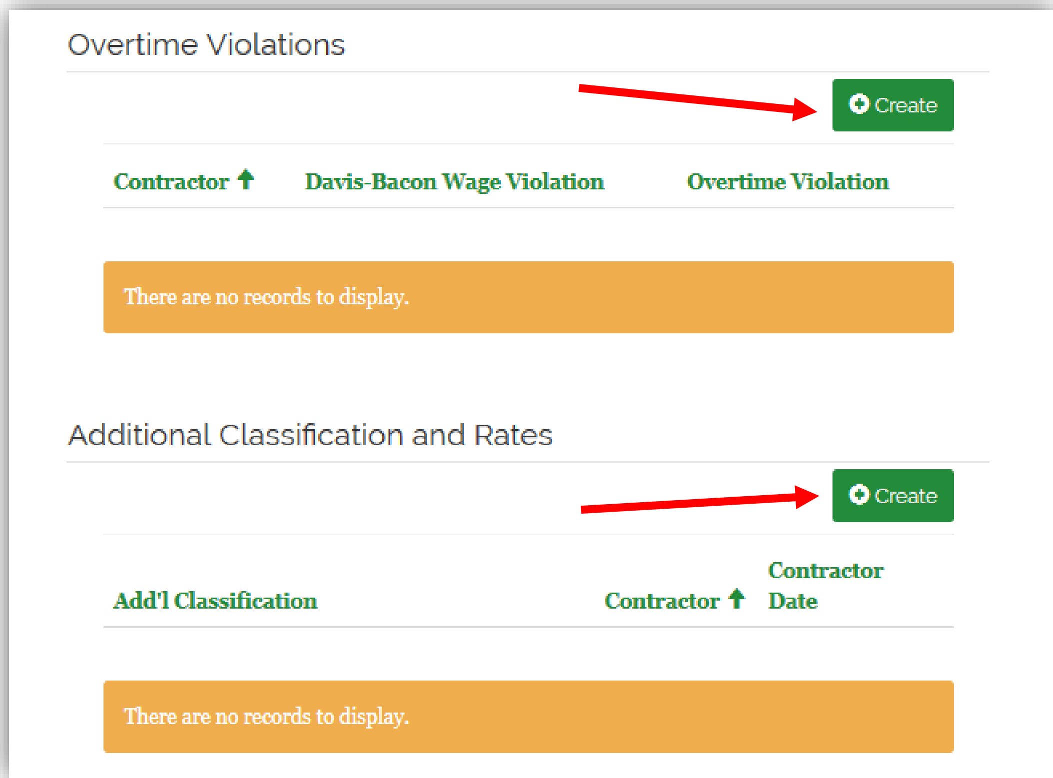
Submitted By (Title)

Total Amount of Liquidated Damages Paid

$0.00

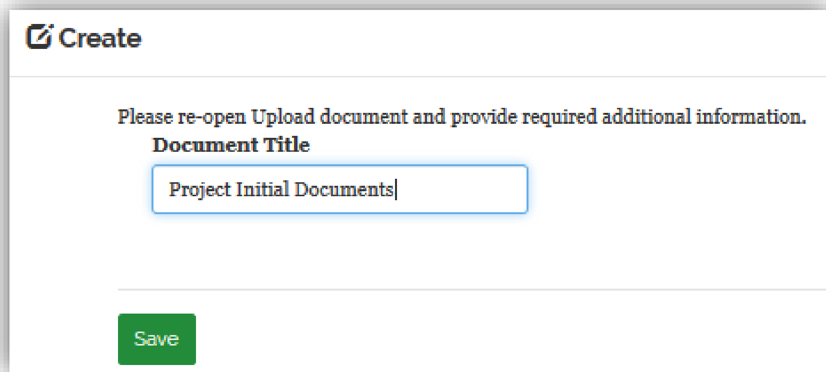
Submitted Date

To enter overtime violations and to enter additional classifications, select **Create** to create new records for each of these

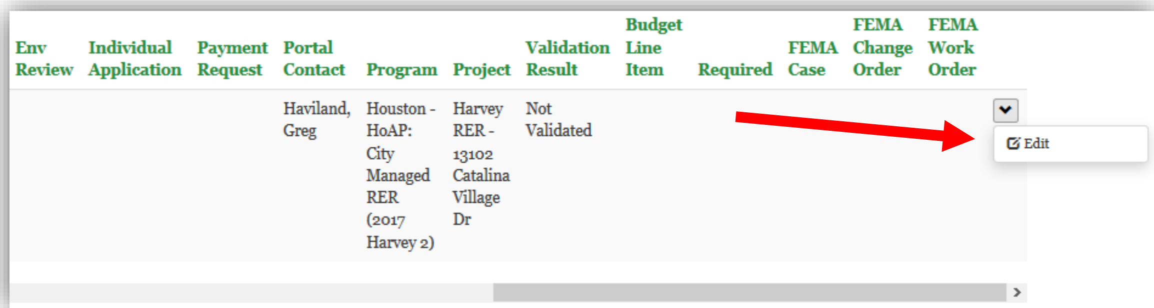


To upload documents related to labor standards required to submit this project for review and approval enter a document title and **Save**.

Check with your GLO Grant Manager to determine which documents are required for the labor standards reporting.

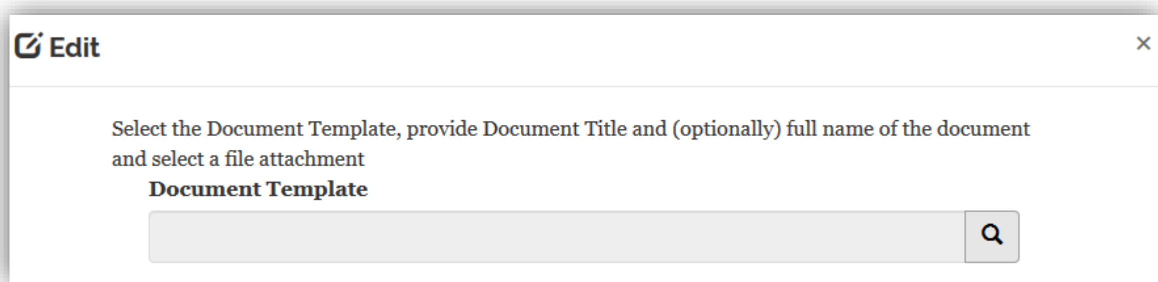


Next, click on the arrow to the right of the record that was created and select **Edit.**



Env Review	Individual Application	Payment Request	Portal Contact	Program	Project	Validation Result	Budget Line Item	Required	FEMA Case	FEMA Change Order	FEMA Work Order
			Haviland, Greg	Houston - HoAP: City Managed RER (2017 Harvey 2)	Harvey RER - 13102 Catalina Village Dr	Not Validated					

Select the Document Template for this upload. A Document Template is just the type of document that you are uploading, it has nothing to do with the format of the document, it is only a means of classification.



To select a document template, click on the magnifying glass icon to begin the search.

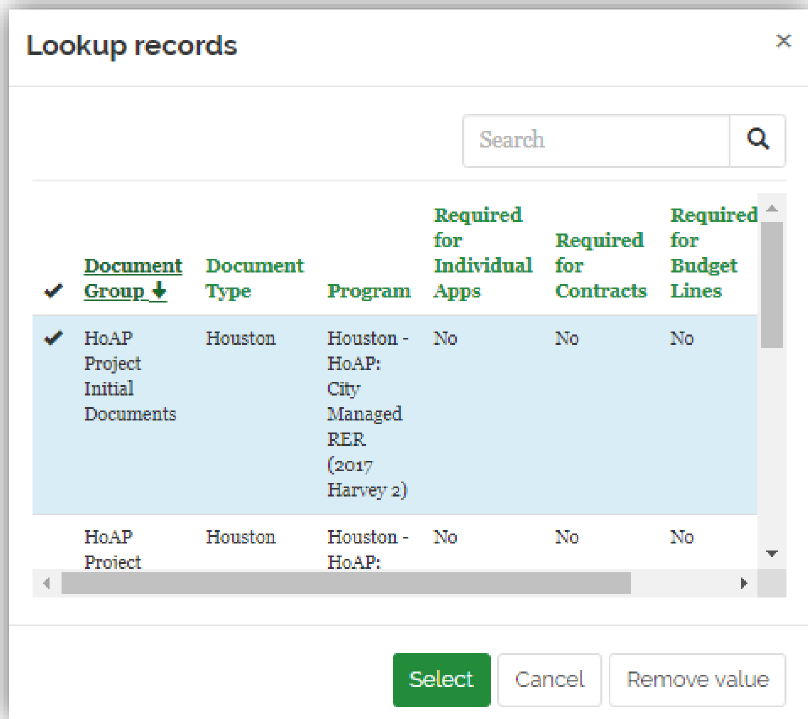
Each program in TIGR can have different document templates. Therefore, only those document templates that are relevant to your program will display in the search.

You can scroll through the document groups until you find the group that is appropriate for your document. Alternatively, you can search through the results to narrow down the list.

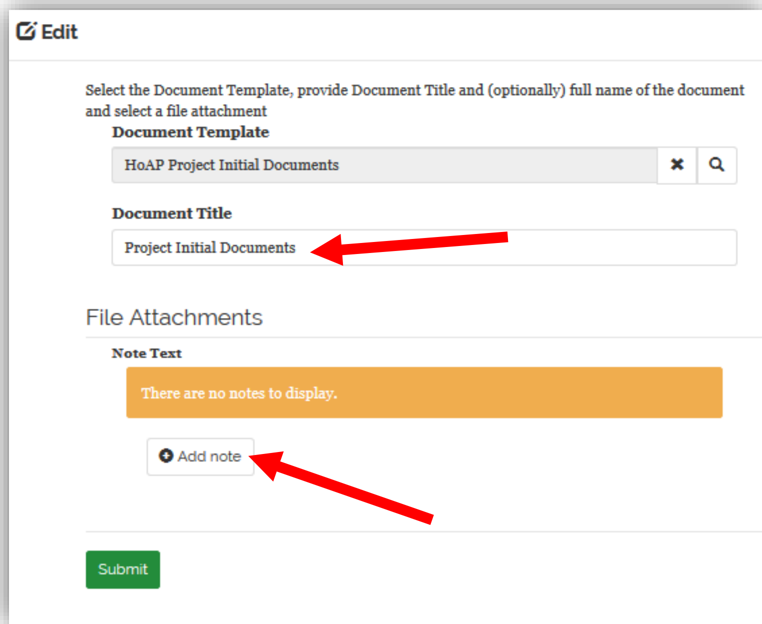
To begin the search, enter a portion of the Group Name such as *invoice* (with asterisks) in the search field, then click on the magnifying glass icon. This will limit the results to only those entries with 'invoice' in the name.

1) Click on the appropriate line

2) Click on **Select** to complete the selection

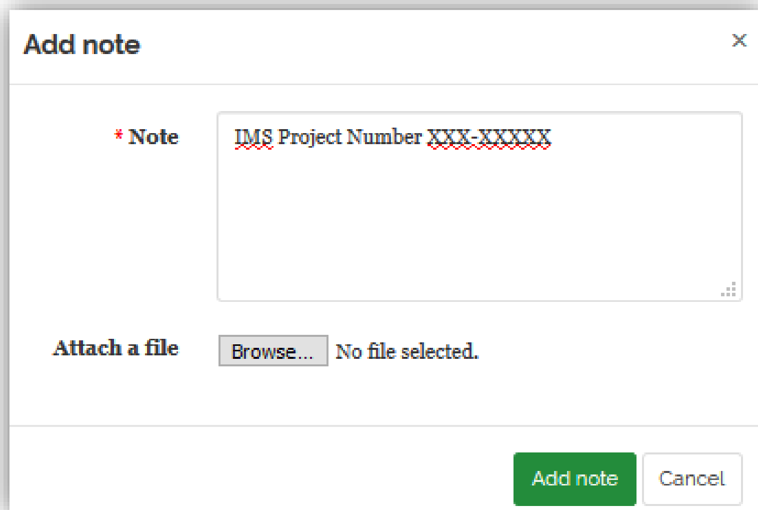


.



Once you have selected the Document Template Type, the document title that you previously provided should be displayed

Add a note and attach a document to the record by selecting **Add Note.** This step is required.



Include in this field a note that more fully describes the document or clarifies any inconsistencies or questions within the application.

Select the ***Browse*** button and select the file that you wish to upload

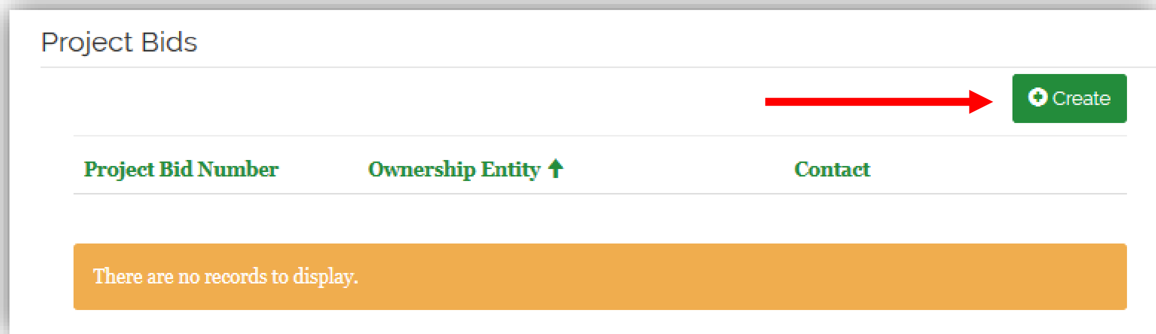
Select ***Submit*** to complete the upload

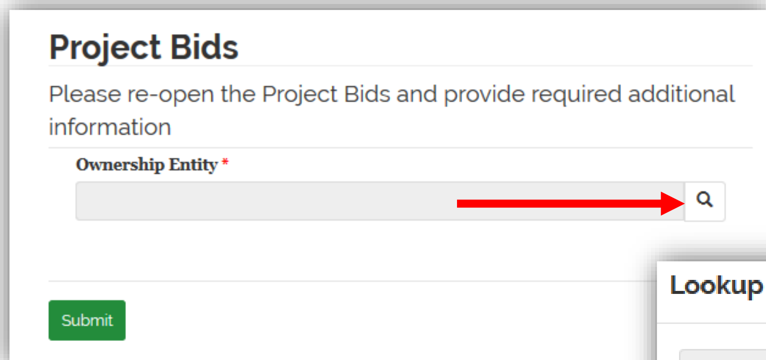
Repeat this process if additional documents are required.

Step 11: Enter Project Bids

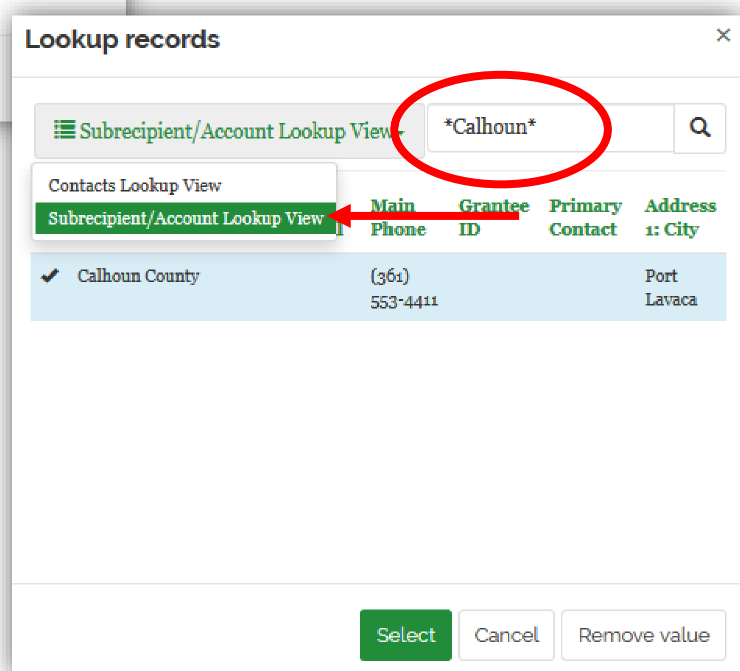
(Infrastructure Projects Only)

When it is time to document the bids received for your project, this information should be entered in this section. To enter a solicitation record, begin by clicking on the **Create** button.





Next enter the Ownership Entity (usually the subrecipient issuing the solicitation).

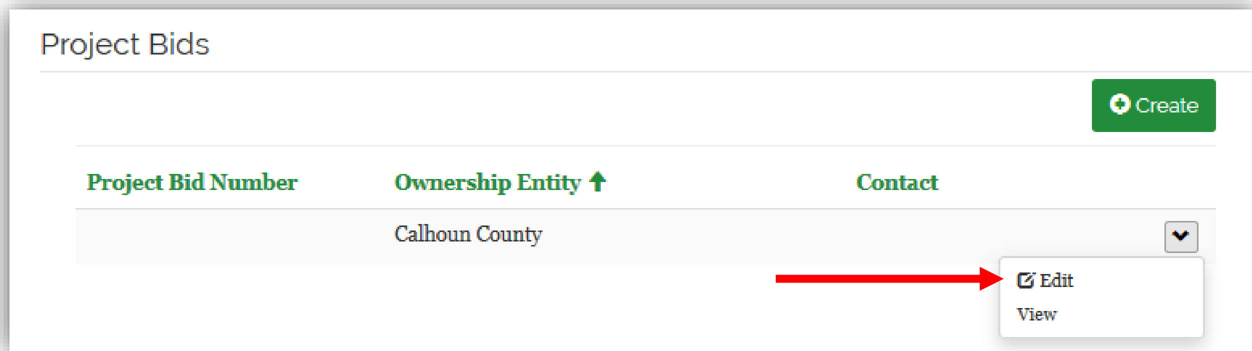


Select from among the Subrecipients using a wildcard search.

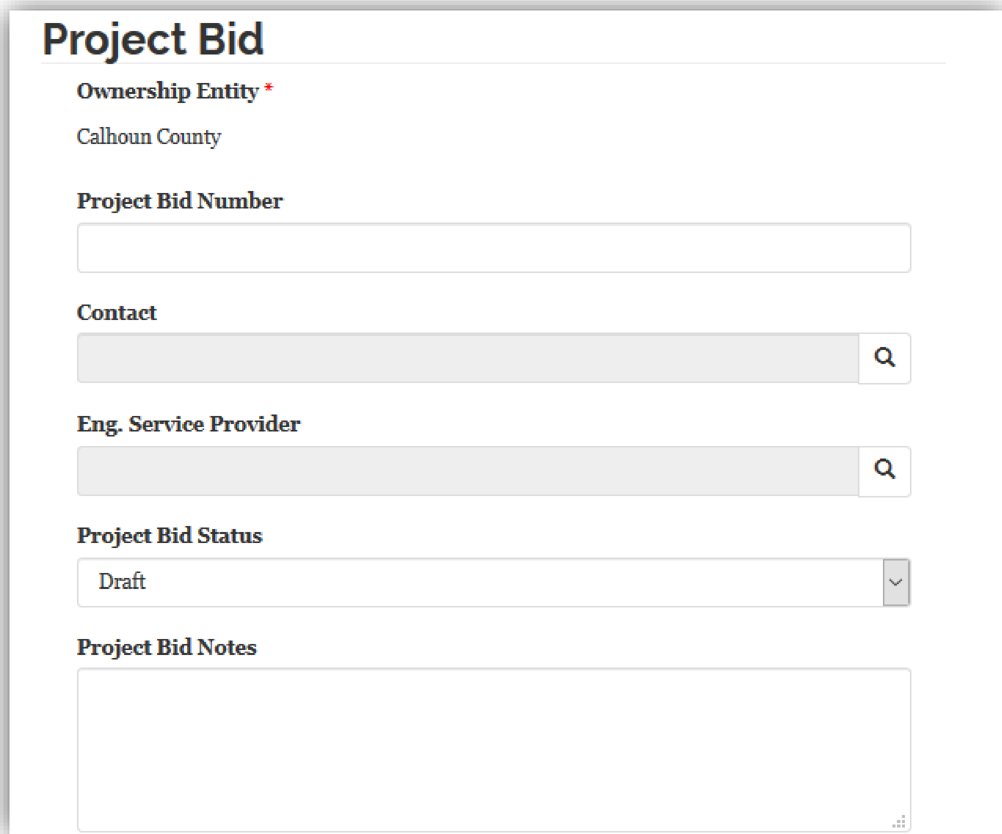
Important: Make sure that you select the **Subrecipient** filter and not the **Contacts** filter.

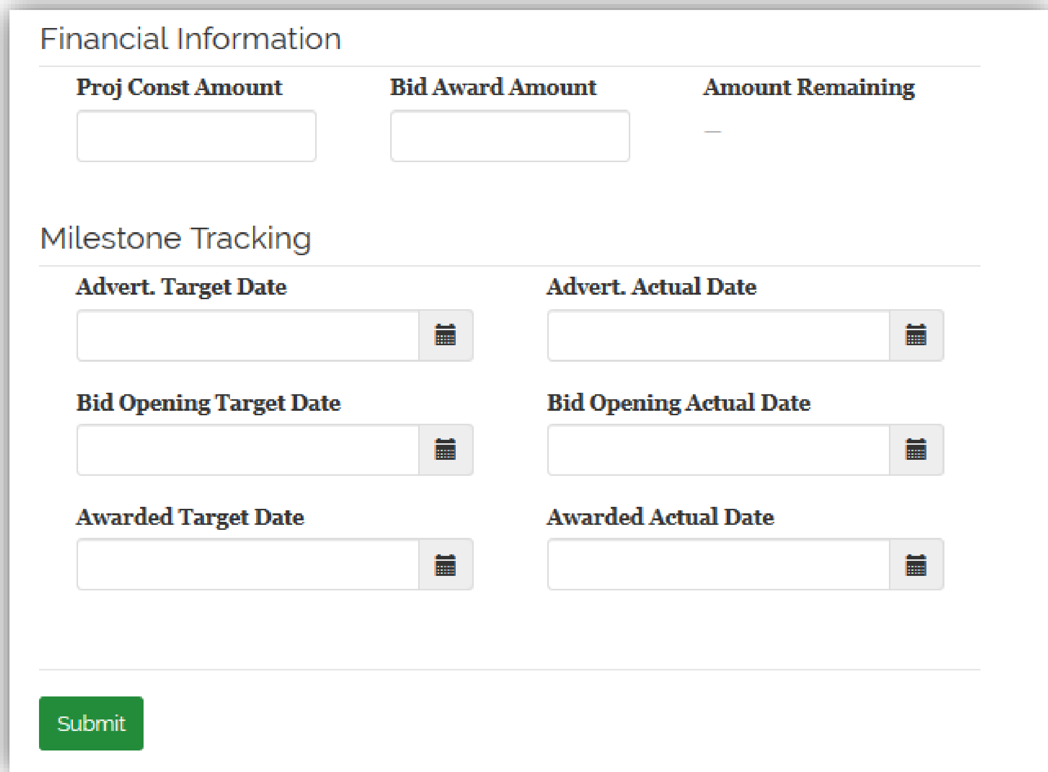
Click on **Select** when you are done.

The TIGR Portal will return you to the Bid section. Identify the line for the data that you just entered and select **Edit** to open up the Project Bid Pages.



Enter the remaining general information about the bid as it becomes available during the phases of the solicitation.





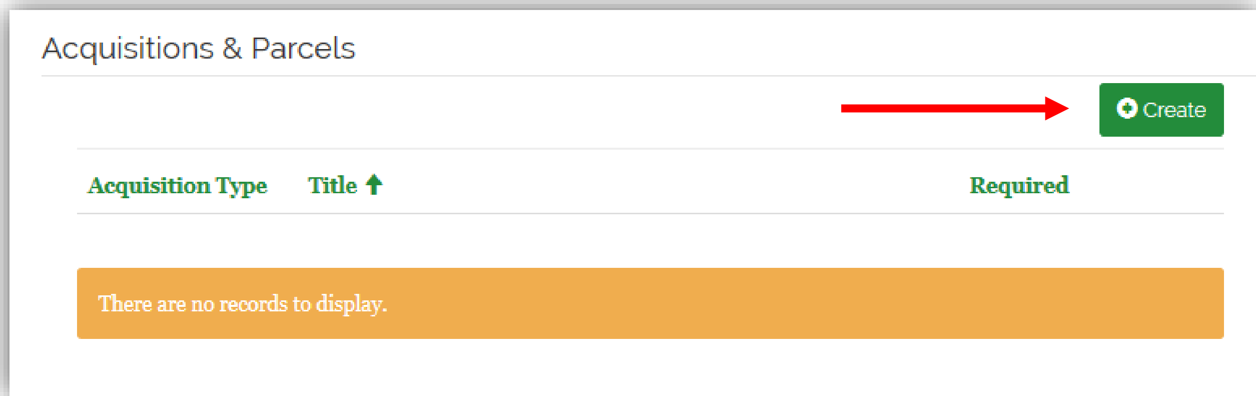
Keep this information current as your solicitation moves through the procurement processes.

Step 12: Enter Acquisition and Parcel Information

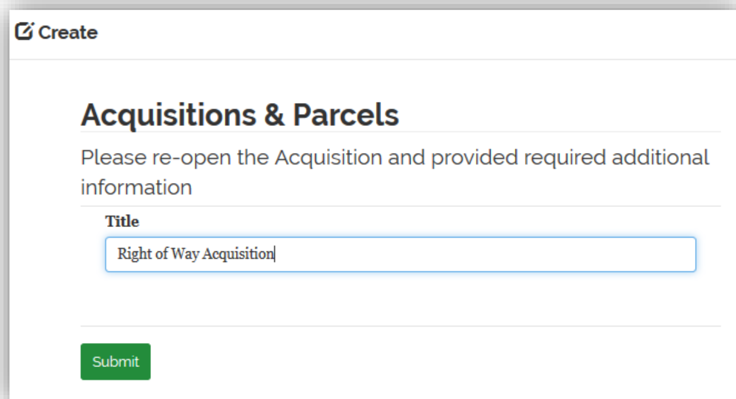
(Infrastructure Projects Only)

If your project will be acquiring real property, this should be documented in this section. A project can have multiple acquisitions and each acquisition can have one or more parcels.

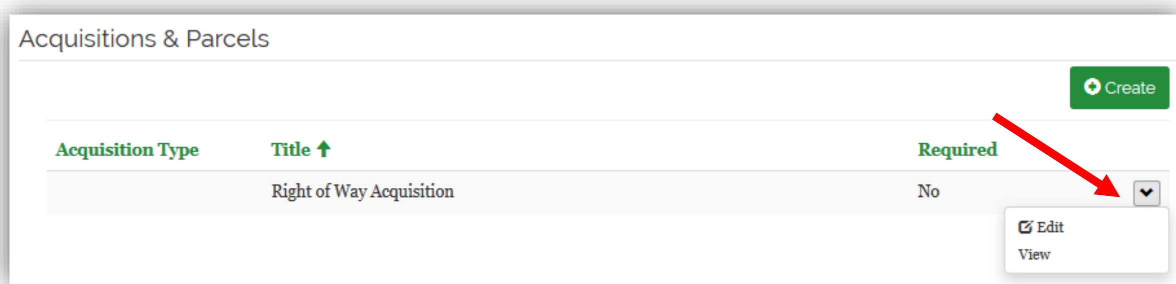
To begin entering this information, click on **Create.**



Enter a title for the acquisition, this could be property name, site or address and click **Submit.** To determine if there is a preferred naming convention for property acquisitions, contact your GLO Grant Manager.



Identify the line for the data that you just entered and select **Edit** to open up the Project Bid Pages.

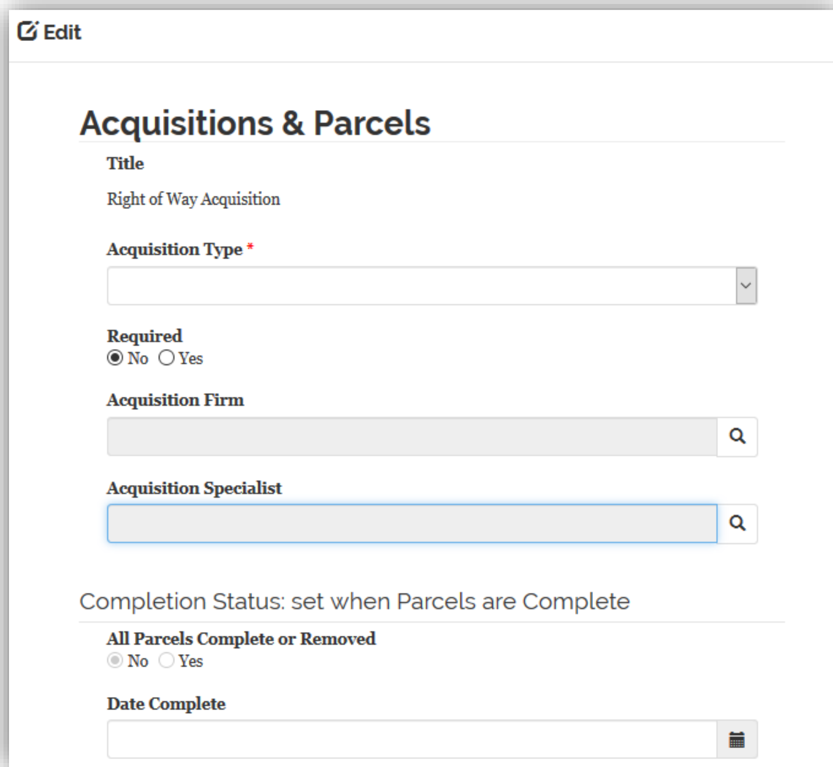


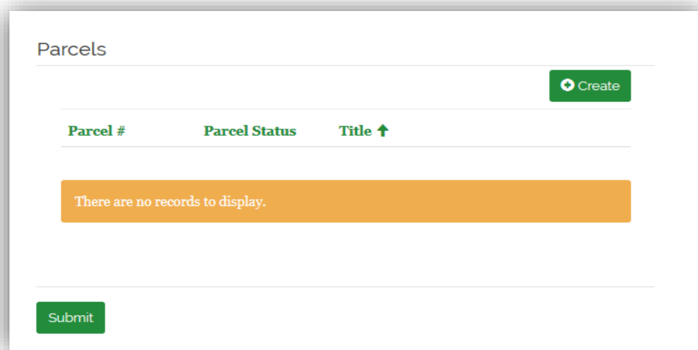
Enter the acquisition information beginning with the Acquisition Type (required).

There are currently four Acquisition Types:

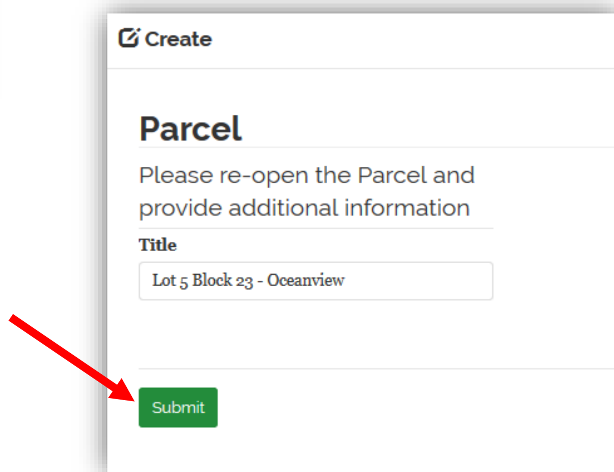
1. Temporary Easement
2. Donation
3. Purchase
4. Condemnation

Enter the Acquisition Firm if one is being used and the Acquisition Specialist.



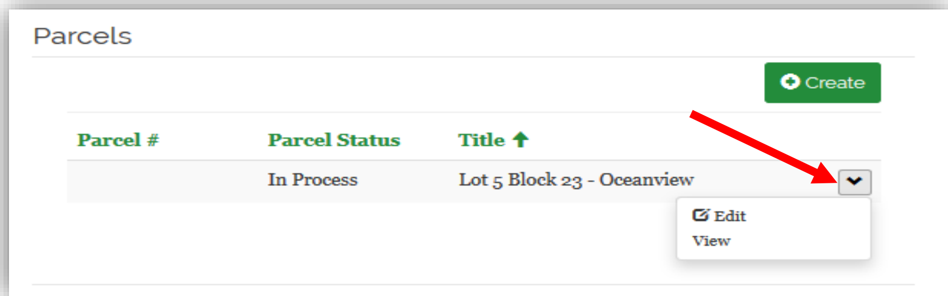


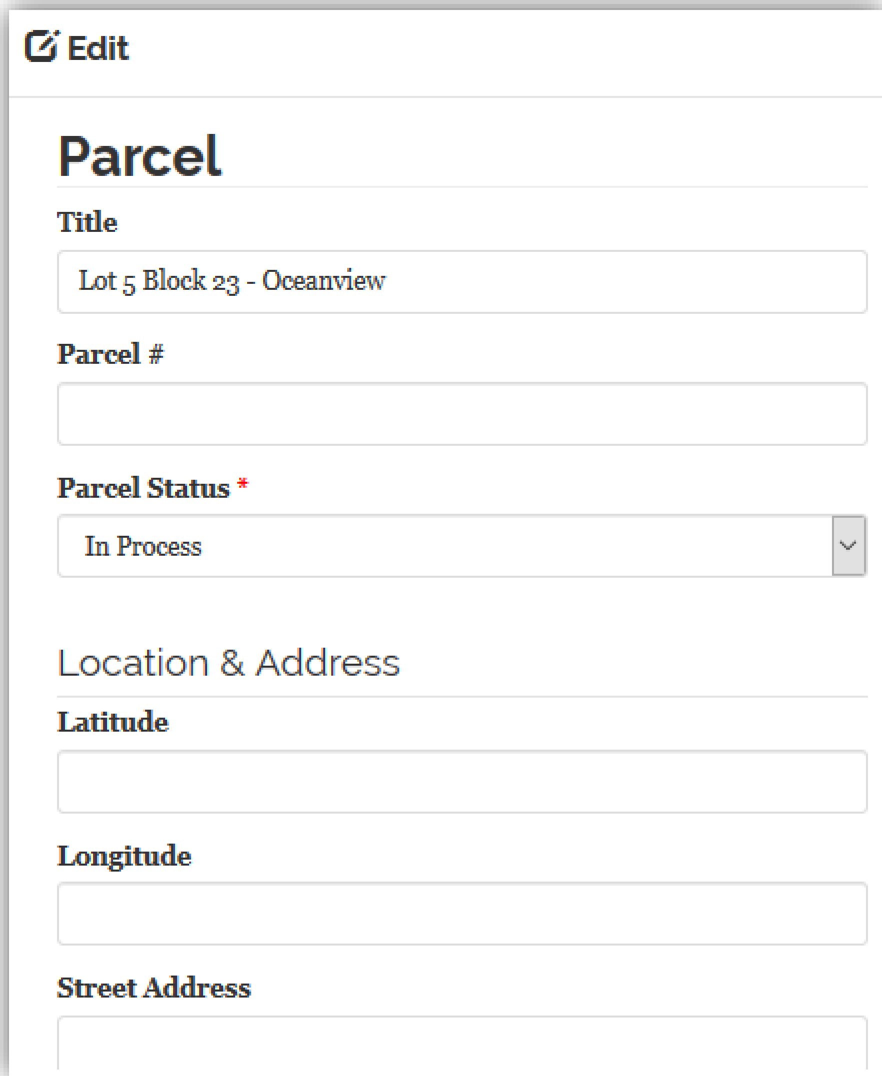
Enter the information for each parcel. Begin by clicking on **Create.**



Provide a title for each parcel, click Submit to save.

Then reopen the parcel record to provide the remaining information.

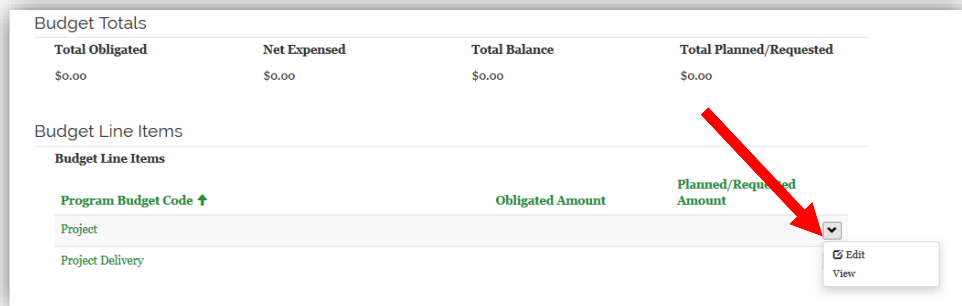


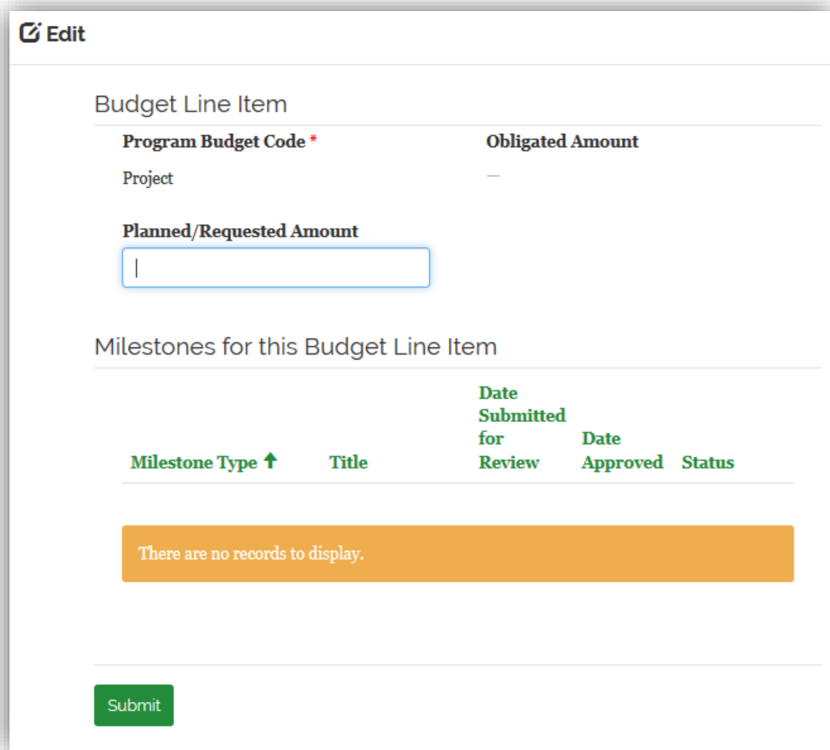


Step 13: Enter Project Budget Information

(All Projects)

Project costs must be allocated to Budget Line Items. Each program may have different budget line items. To enter the budget information for the project select **Edit** from the drop-down list box to the right of the appropriate budget code line. If you are unsure which Program Budget Code applies, contact your GLO Grant Manager.





Enter the total budget amount for this budget line item (Program Budget Code).

You will not see any milestone information at this time.

Select **Submit** to return to the **Edit My Draft Project** screen.

Repeat this process if you intend to allocate your project costs across multiple budget line items.

Step 14: Enter Project Metrics

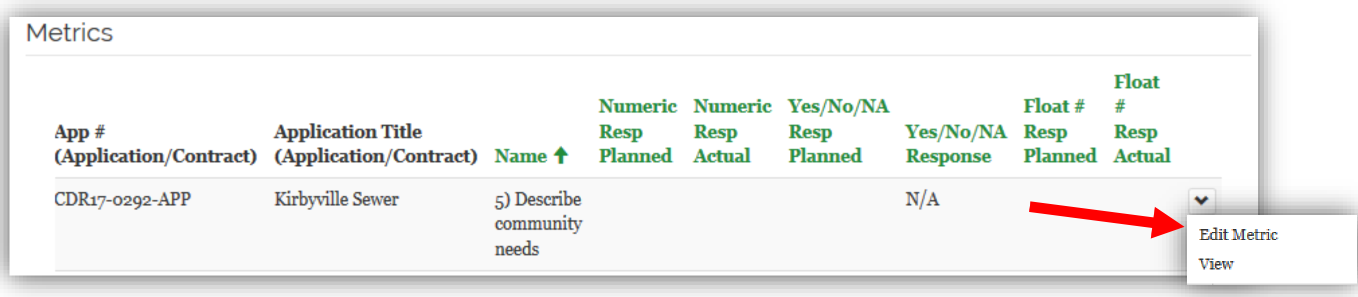
(All Projects)

Each Program in TIGR may collect additional information for the purposes of tracking progress, reporting statistics back to HUD and for other needs. This information is captured in the form of project metrics and these specific questions will apply to all projects in a given program. If there are Metrics questions for a project, the responses to these questions are required before the project will be approved.

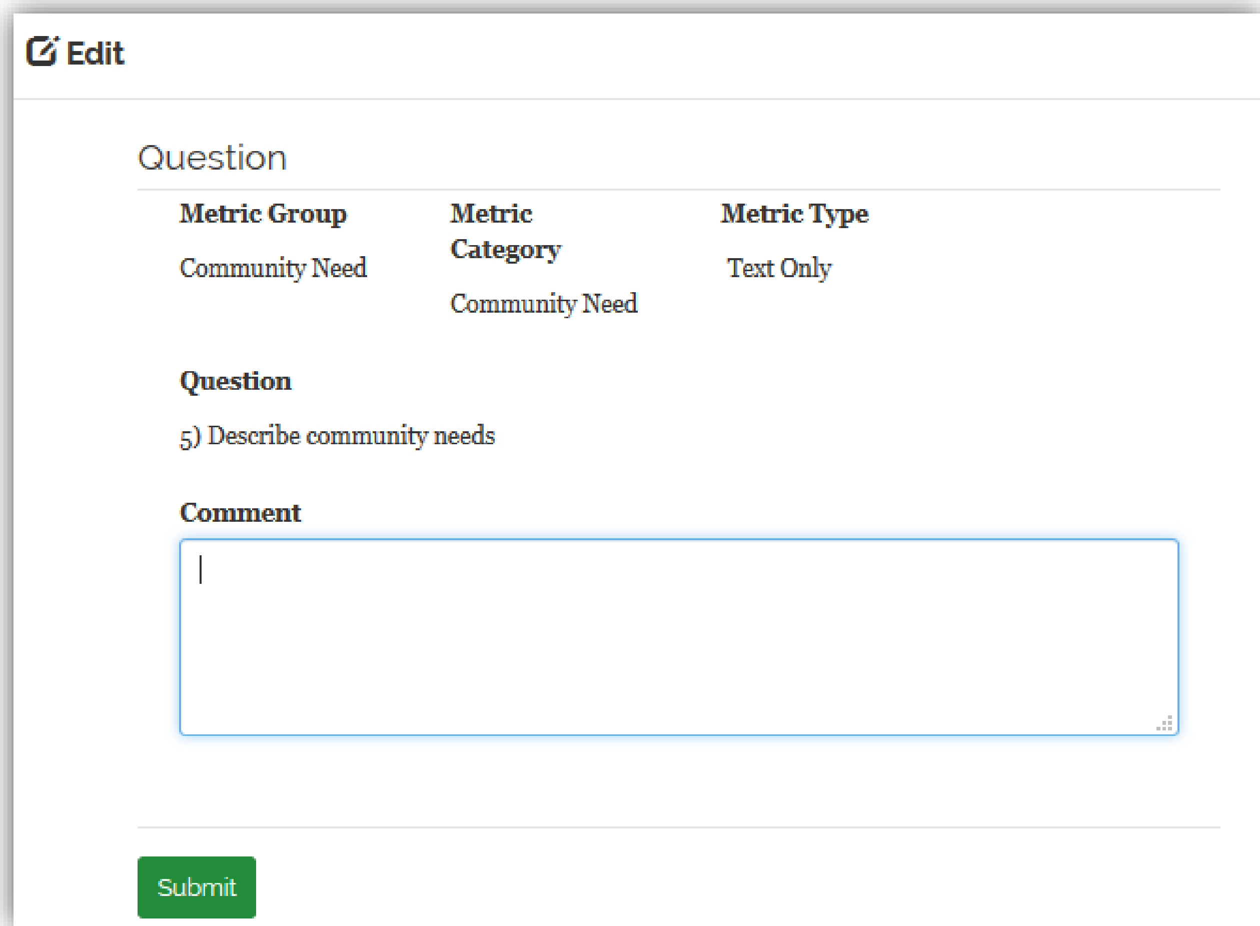
Each program may need to collect specific information and therefore each may have a unique set of metrics to collect. For example:

- Housing projects may be asked to ***Describe past efforts to increase the supply of affordable housing***
- Multi-family projects may be asked to provide the ***Number of LMI units***
- Infrastructure projects may be asked to declare the ***Linear feet of drainage improvement***

The metrics for your program will be displayed in this section. To respond, click on the down-arrow to the left and select **Edit Metric**.



This will open up a pop-up window to allow you to provide a response, in this case a text response. Click **Submit** when you are ready to move on.

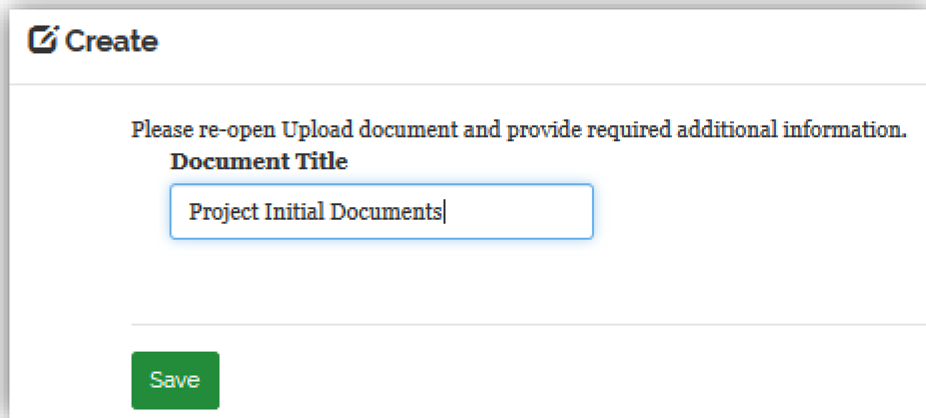


Other types of questions may require numeric responses or a response of Yes/No/NA/Unknown. Repeat these steps for each of the questions for this program.

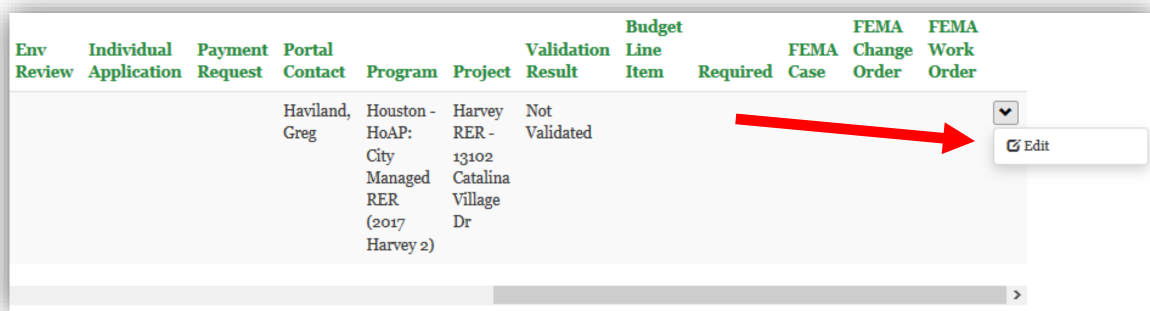
Step 15: Upload Documents

(All Projects)

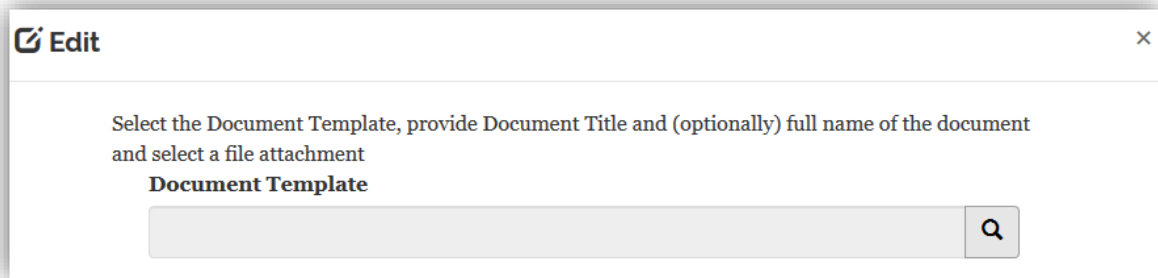
Now, upload all required documents required to submit this project for review and approval. Check with your GLO Grant Manager to determine which documents are required for the various stages of your project. Using the ***Create*** button at the bottom right of the **Payment Request Details** page, enter the document title and **Save**.



Click on the arrow to the right of the record that was created and select **Edit.**



Select the Document Template for this upload. A Document Template is just the type of document that you are uploading, it has nothing to do with the format of the document, it is only a means of classification.



To select a document template, click on the magnifying glass icon to begin the search.

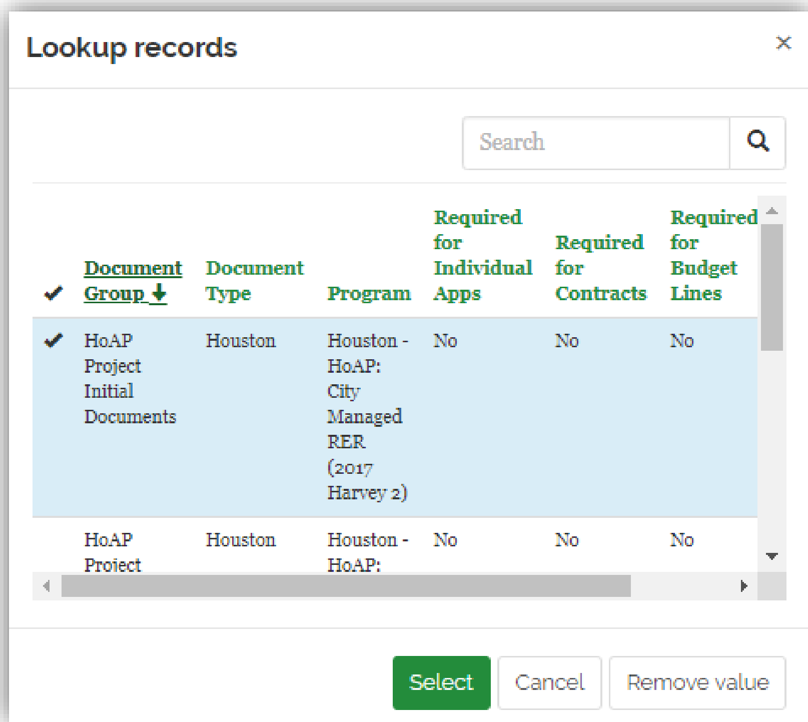
Each program in TIGR can have different document templates. Therefore, only those document templates that are relevant to your program will display in the search.

You can scroll through the document groups until you find the group that is appropriate for your document. Alternatively, you can search through the results to narrow down the list.

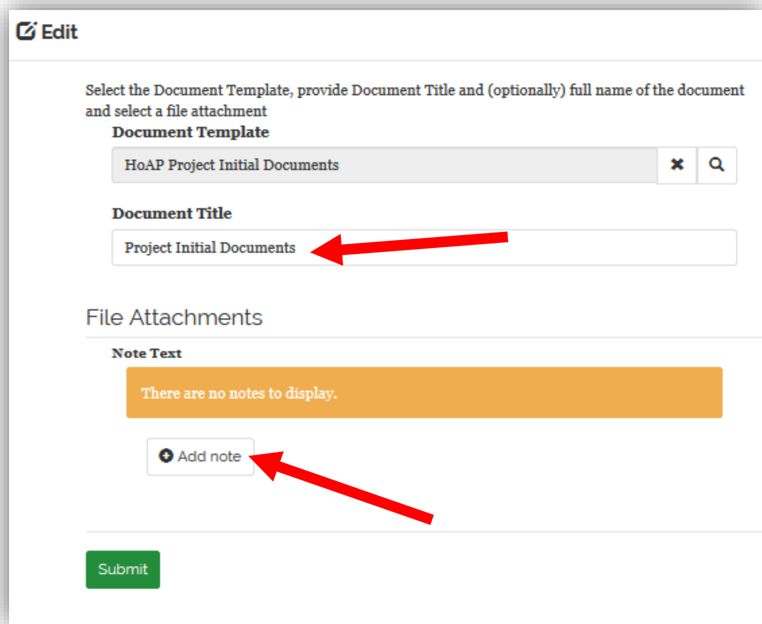
To begin the search, enter a portion of the Group Name such as *invoice* (with asterisks) in the search field, then click on the magnifying glass icon. This will limit the results to only those entries with ‘invoice’ in the name.

3) Click on the appropriate line

4) Click on **Select** to complete the selection

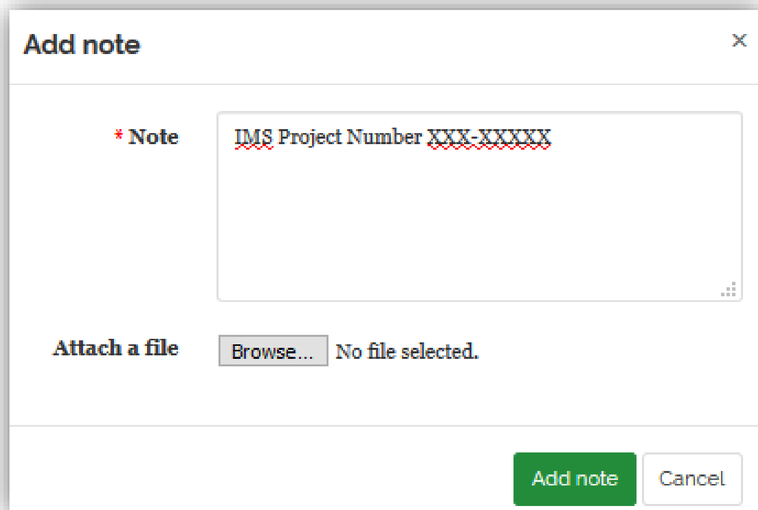


.



Once you have selected the Document Template Type, enter the document title that you would like to have displayed

Add a note and attach a document to the record by selecting **Add Note.** This step is required.



Include in this field a note that more fully describes the document or clarifies any inconsistencies or questions within the application.

Select the ***Browse*** button and select the file that you wish to upload

Select ***Submit*** to complete the upload

Repeat this process if additional documents are required.

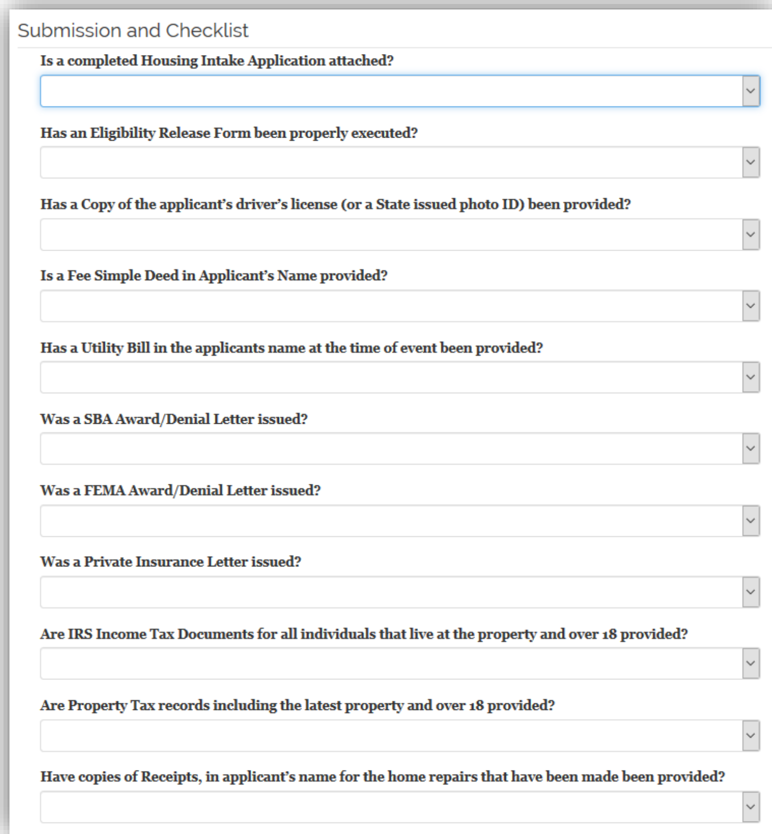
Required Documentation. If you have a question about which documents are required for initial submission contact your Grant Manager.

Step 16: Complete Project Submission Checklist

(All Projects)

The Submission Checklist is the opportunity for the applicant to confirm to the GLO Grant Manager that certain actions have been performed prior to the submission of the project for review and approval.

Please answer ALL of the questions. Some of these may not be applicable to the type of project you are submitting; in this case select N/A, but please respond to all of the questions so that your Grant Manager knows that you read each question.


Submission and Checklist

Is a completed Housing Intake Application attached?

Has an Eligibility Release Form been properly executed?

Has a Copy of the applicant's driver's license (or a State issued photo ID) been provided?

Is a Fee Simple Deed in Applicant's Name provided?

Has a Utility Bill in the applicants name at the time of event been provided?

Was a SBA Award/Denial Letter issued?

Was a FEMA Award/Denial Letter issued?

Was a Private Insurance Letter issued?

Are IRS Income Tax Documents for all individuals that live at the property and over 18 provided?

Are Property Tax records including the latest property and over 18 provided?

Have copies of Receipts, in applicant's name for the home repairs that have been made been provided?

Select **Save Project** at the bottom of the page to save the information entered.

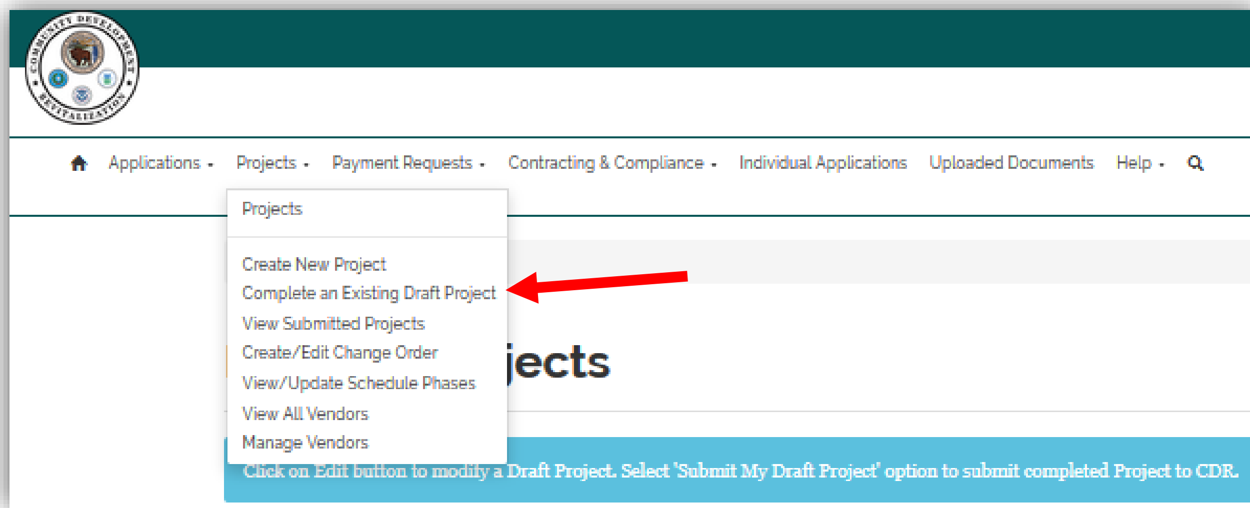
The project is now saved, however, is NOT the Final Submission of the Project Request.

Step 17: Final Submission

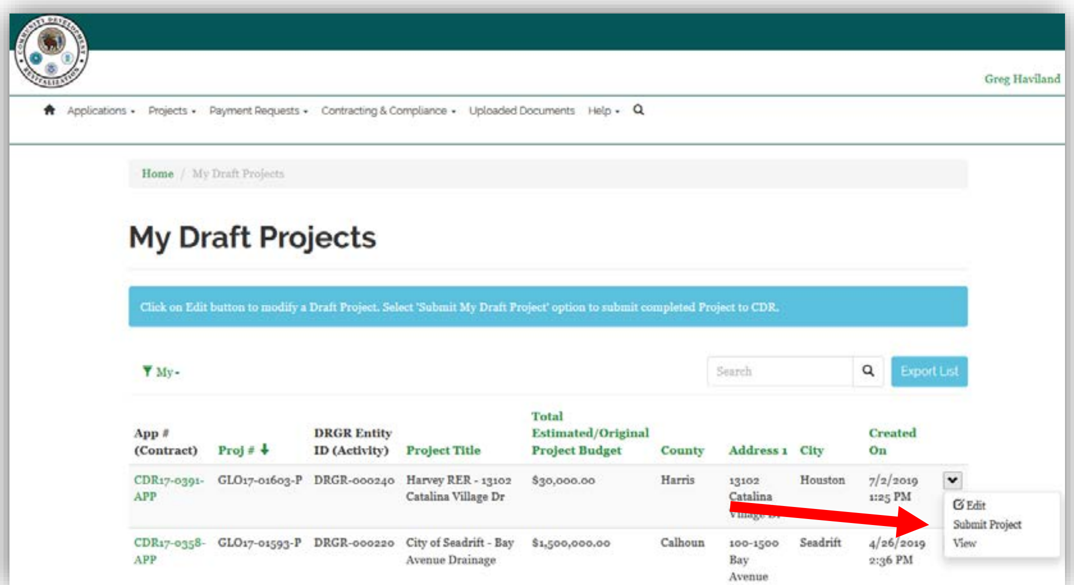
(All Projects)

You can change almost anything in a project until you perform this final submission. You have not submitted the project for review and approval until you have performed this final step.

For final submission return to the main menu and select **Complete an Existing Draft Project.**



From the list of Draft Projects, find the project to be submitted, and select the **Submit Project** option from the drop-down list box to the right.

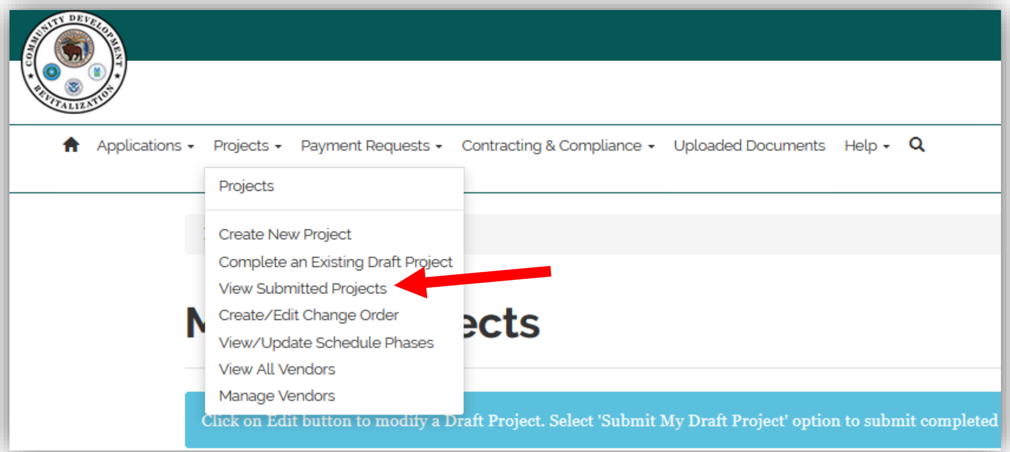


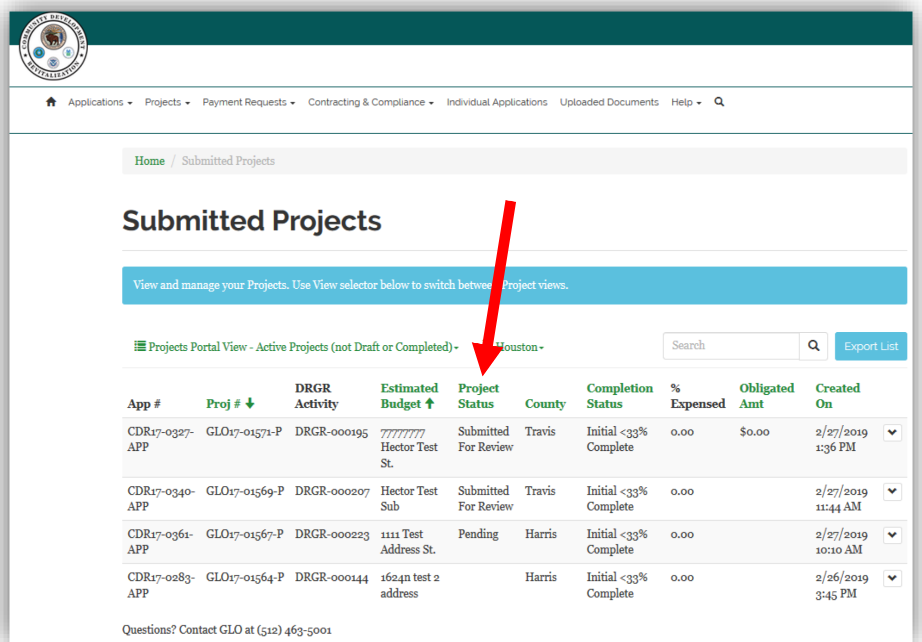
This is the final step to submit a project.

Step 18: Validate Final Submission

(All Projects)

Once you have performed a Final Submission, you can check to see that the request has been successfully submitted. From the main menu, select **View Submitted Projects.**





App #	Proj #	DRGR Activity	Estimated Budget	Project Status	County	Completion Status	% Expensed	Obligated Amt	Created On
CDR17-0327-APP	GLO17-01571-P	DRGR-000195	7777777 Hector Test St.	Submitted For Review	Travis	Initial <33% Complete	0.00	$0.00	2/27/2019 1:36 PM
CDR17-0340-APP	GLO17-01569-P	DRGR-000207	Hector Test Sub	Submitted For Review	Travis	Initial <33% Complete	0.00		2/27/2019 11:44 AM
CDR17-0361-APP	GLO17-01567-P	DRGR-000223	1111 Test Address St.	Pending	Harris	Initial <33% Complete	0.00		2/27/2019 10:10 AM
CDR17-0283-APP	GLO17-01564-P	DRGR-000144	1624n test 2 address		Harris	Initial <33% Complete	0.00		2/26/2019 3:45 PM

If the status of your project is **Submitted for Review**, then it has been successfully submitted.

You can also use this landing page in the future to track the status of all your projects.

Chapter 4 – Submitting Payment Requests

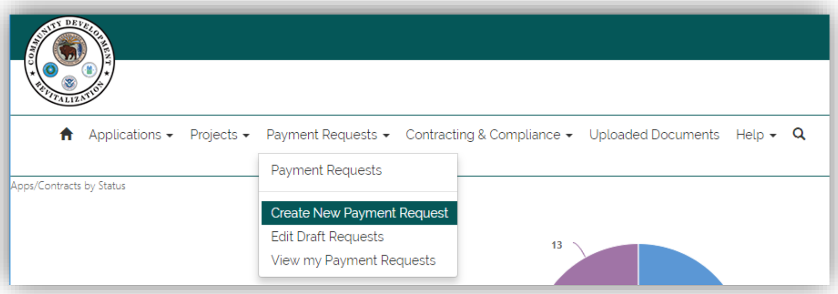
This chapter describes the process for entering payment requests into the TIGR Portal. All payment requests are entered based on DRGR Activity. Therefore, payment requests can incorporate multiple projects as long as they are all in the same Activity.

Creating New Payment Requests

To begin the process of submitting payments, log into the TIGR Portal and follow the instructions below:

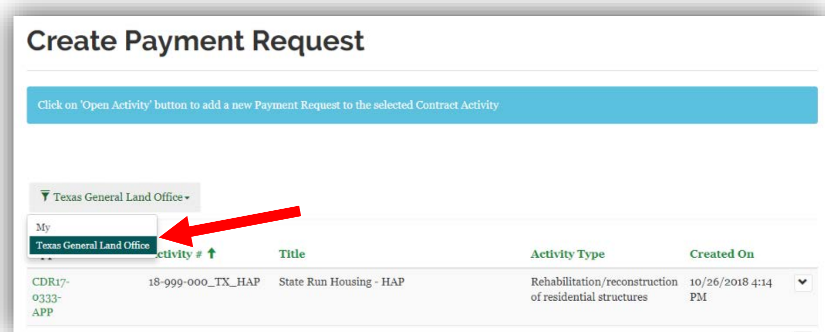
Step 1: Create New Payment Request

Select ***Create New Payment Request*** from the Payment Requests menu. This will open the **Create Payment Request** screen.



This will bring up a list of all current contracts for which you are the Contact.

You may need to change the **My/My Organization** filter to the City or County you are working with to see the correct Contract.

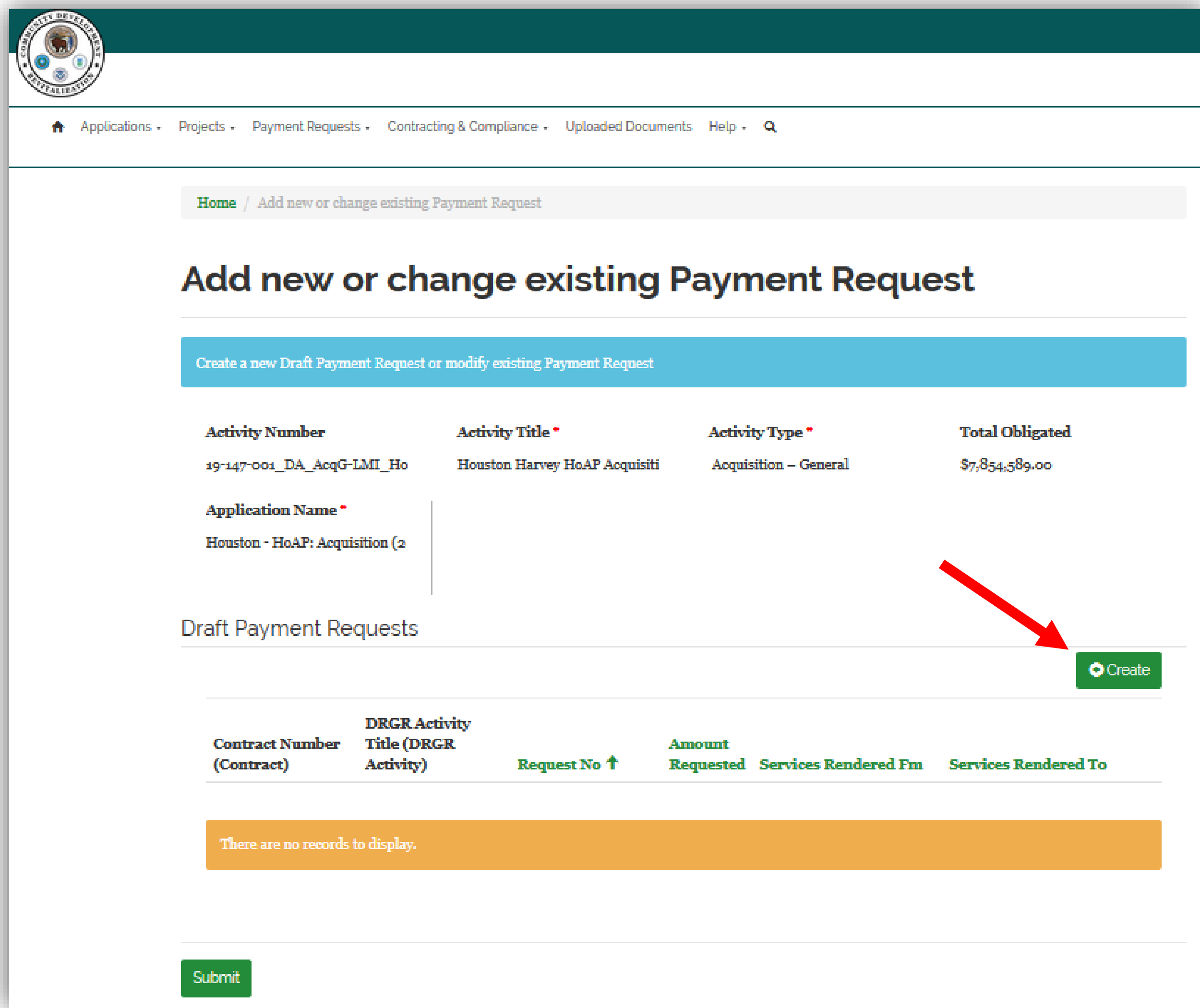


Search for and identify the DRGR Activity that for the Payment Request, then click on the down arrow on the far right of the screen. Select ***Open Activity***. This will open the **Add new or change existing Payment Request** screen.

Step 2: Create New Payment Request

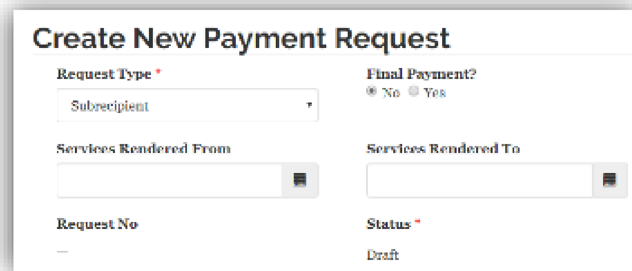
This will open the **Add new or change existing Payment Request** window.

To add a new payment request, click on **Create**.



This will open the **Create New Payment Request** window.

Enter the fields in the Create **New Payment Request** window.



Request Type: Indicate the type of payment being requested.

Final Payment? Indicate whether this is the final payment associated with this activity. Select this ONLY if this is the final payment for this project or contract.

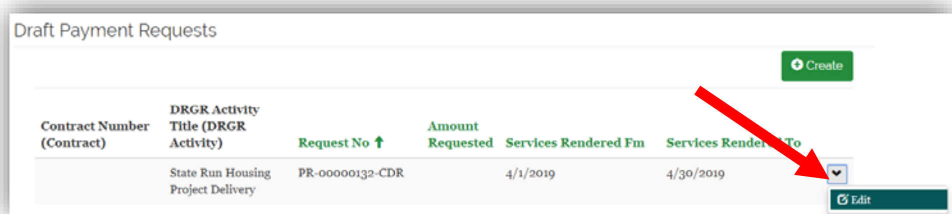
Service Rendered From and **Service Rendered To**: Indicate the period for services rendered for the payment.

Then click ***Submit***.

This will create a header record for the payment request and automatically assign a request number. TIGR will automatically close the pop-up window and bring you back to the **Add new or change existing Payment Request** page. Your new request should now be displayed in the **Draft Payment Requests** table.

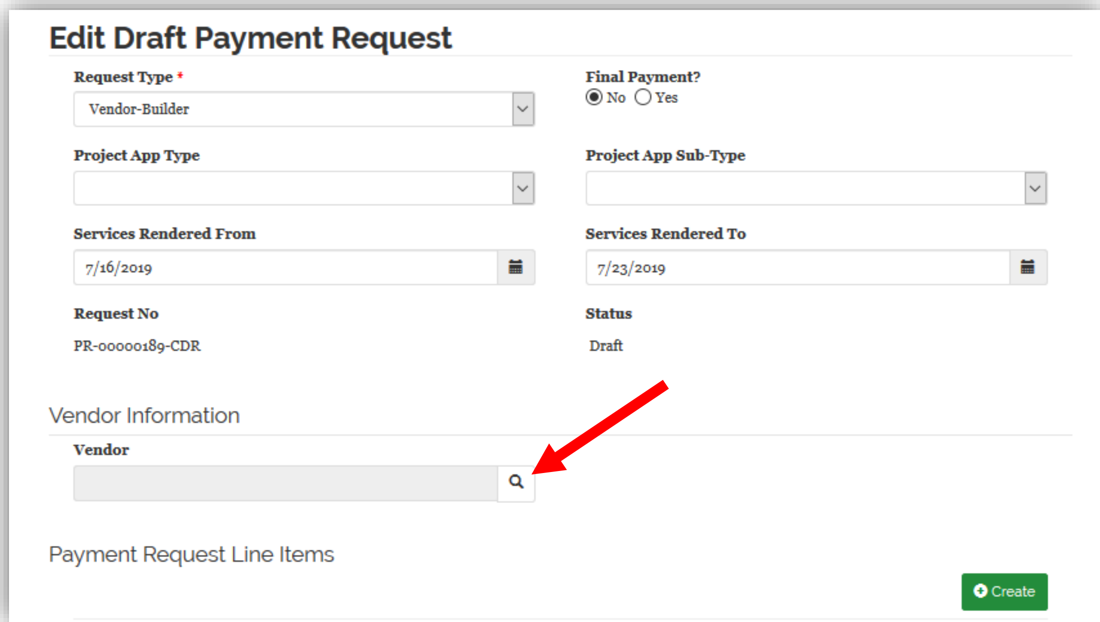
Step 3: Enter Payment Request Details

For the payment request header record just created, click on the down arrow on the far right of the record and select ***Edit***.

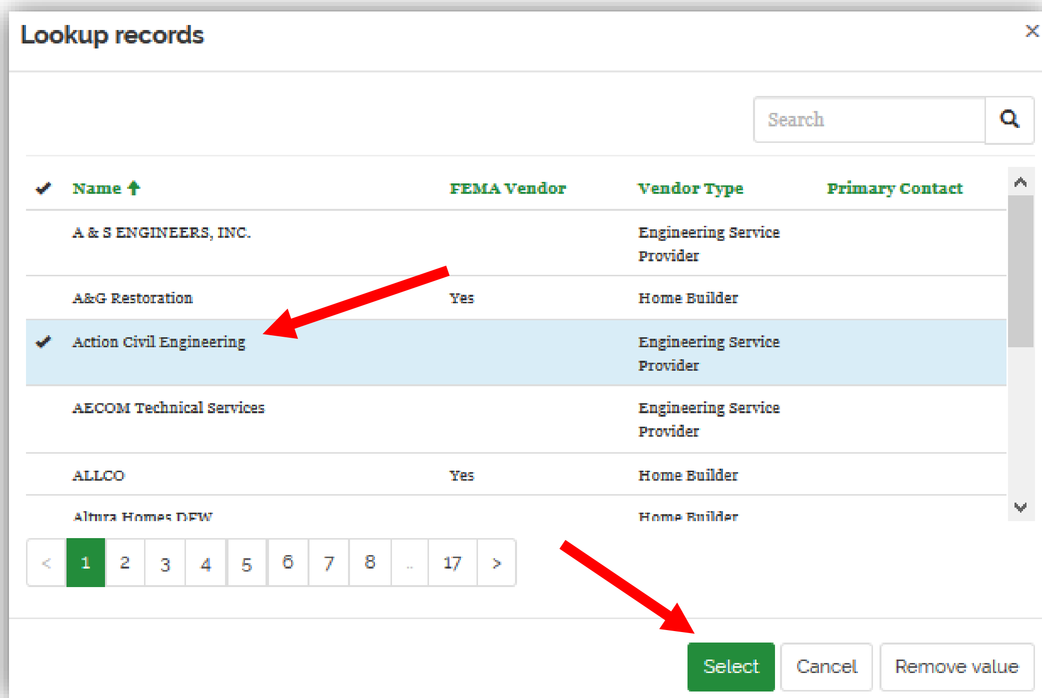


This will open the **Payment Request Details** page. This page requires the submitter to enter Payment Request Line Items, invoice information for each invoice being submitted. In addition, the requestor will need to submit supporting documentation for each request.

Begin by clicking on the search icon to the right of the **Vendor** box to search for the vendor.

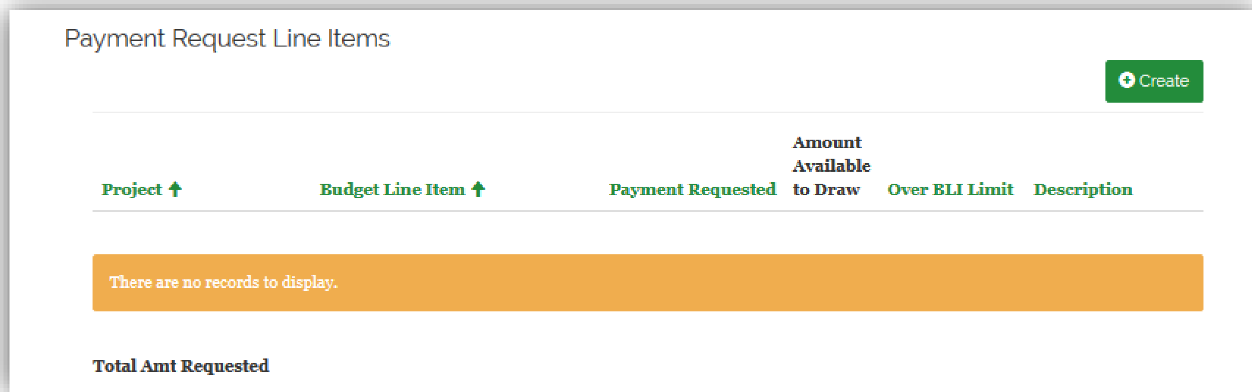


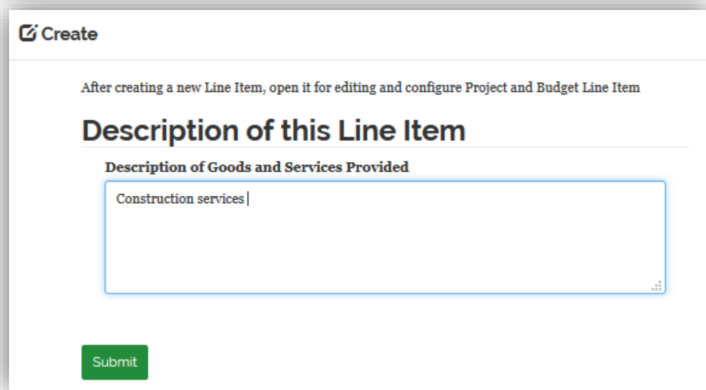
Search for and select the vendor associated with this payment. The list of vendors is very long, so you may want to use the Search feature in the upper right-hand corner of this window.



Click on the name of the appropriate vendor and then click **Select** to continue.

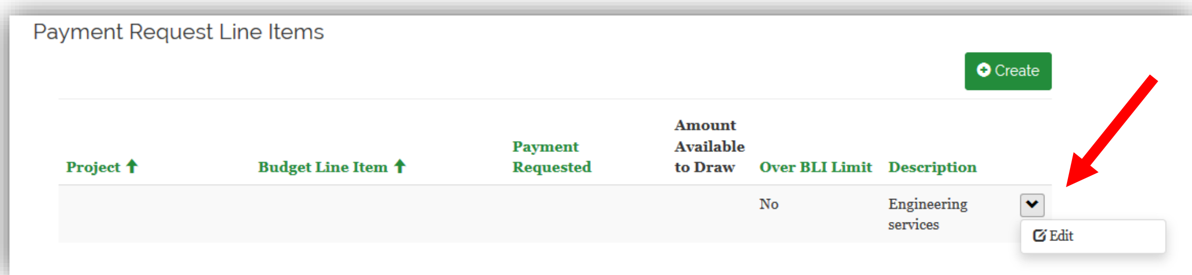
You will now be asked to provide the amount of the payment for each Budget Line Item in the project. To the right of Payment Request Line Items, select ***Create.*** This will open a pop-up window for the submitter to enter a description of the goods or services being provided.





You will be asked to provide a description of the items or services provided for this Payment Request Line Item.

Once the description is complete, select ***Submit.*** This automatically closes the pop-up window and adds a line item to the **Payment Request Line Items** table.



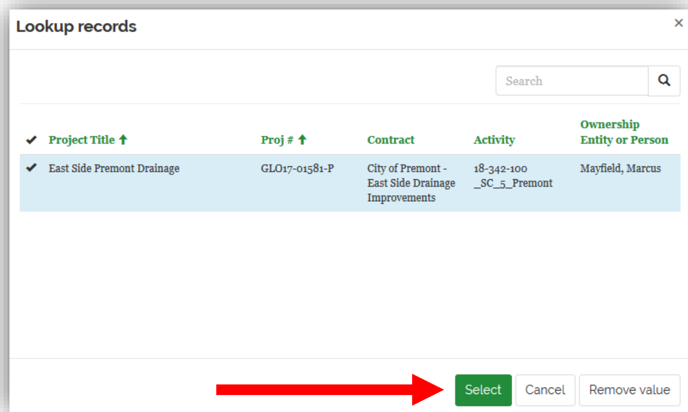
Now we need to identify the project. Click on the down arrow to the right of the newly created line item and select ***Edit***.

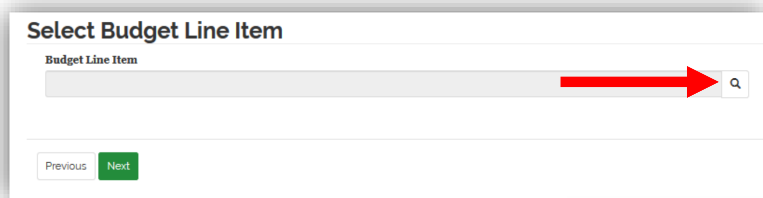
This will open the **Modify Payment Request Line Item** screen. Click on the search icon to the right to select a project.

This will open a pop-up box with a list of Projects associated with this DRGR Activity.

Chose the project for this payment request and click ***Select***.

TIGR will return to the **Modify Payment Request Line Item** screen.





Next search for the budget line item of the selected project. Click the search icon to bring up the list of Budget Line Items for this project.

Click on the applicable project and then ***Select***.

TIGR will return to the **Modify Payment Request Line Item** screen.

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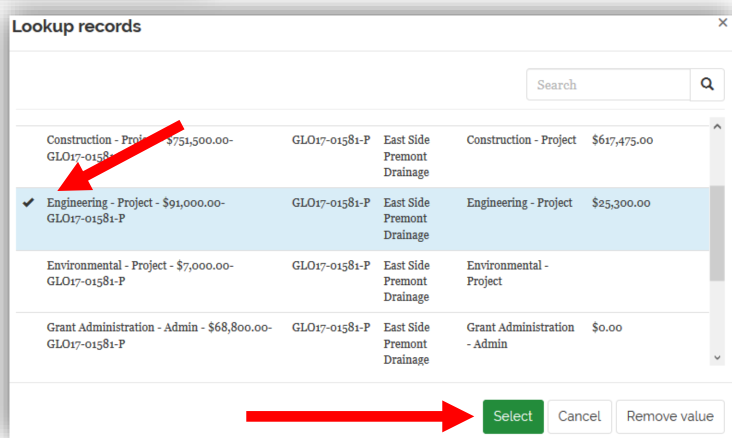
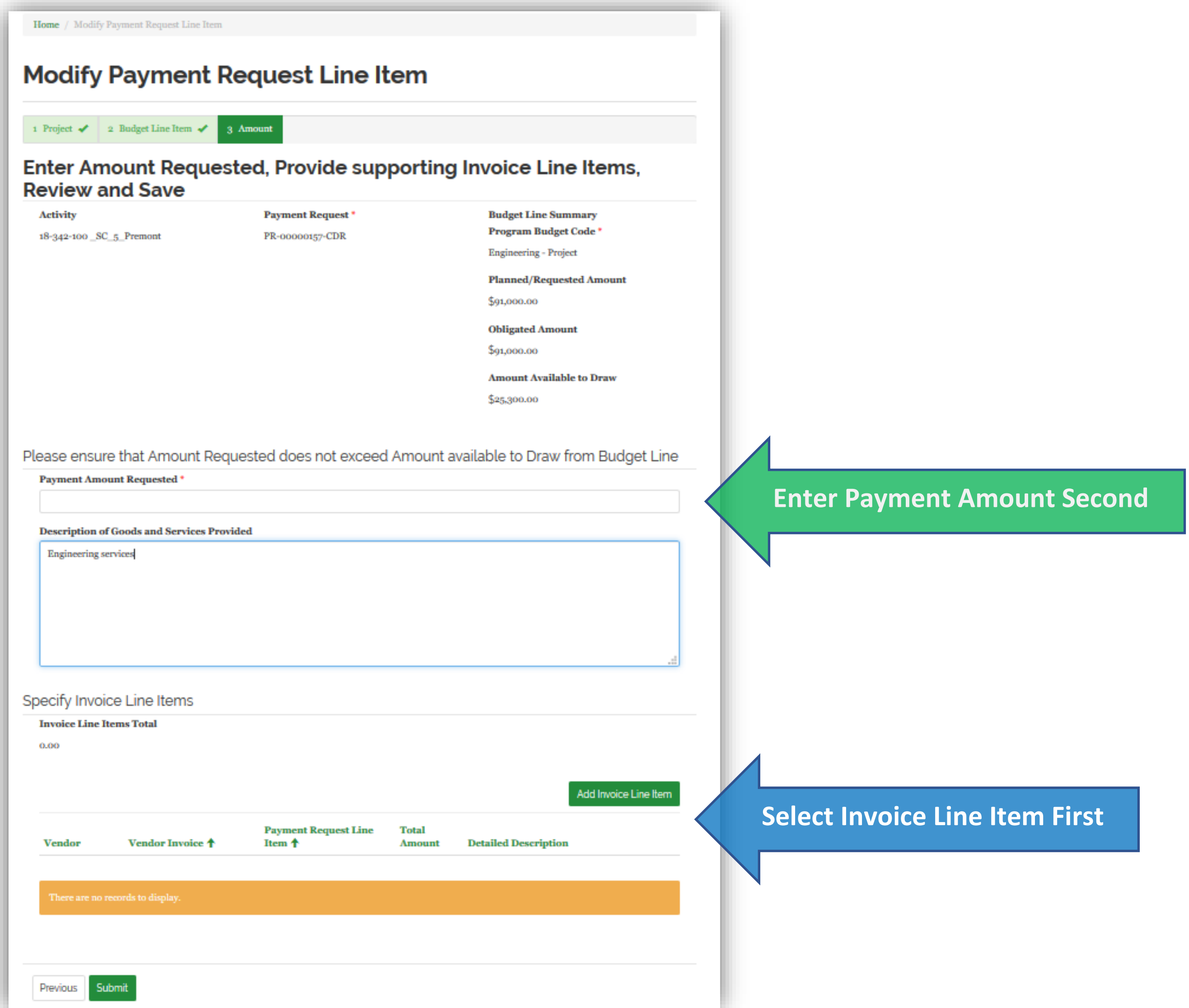


Step 4: Invoice Line Item and Payment Amount Requested

Add the line item(s) from the invoice associated with this payment.

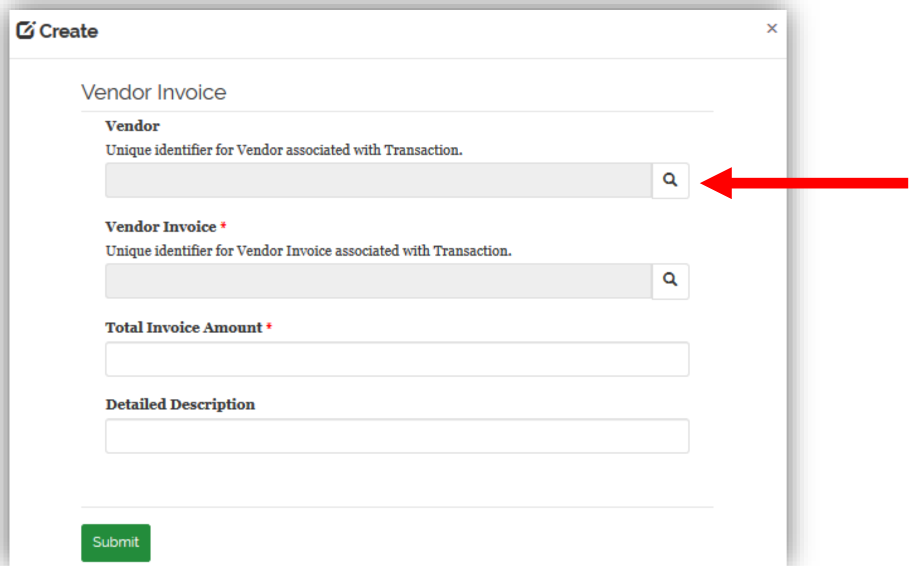
Select ***Add Invoice Line Item***



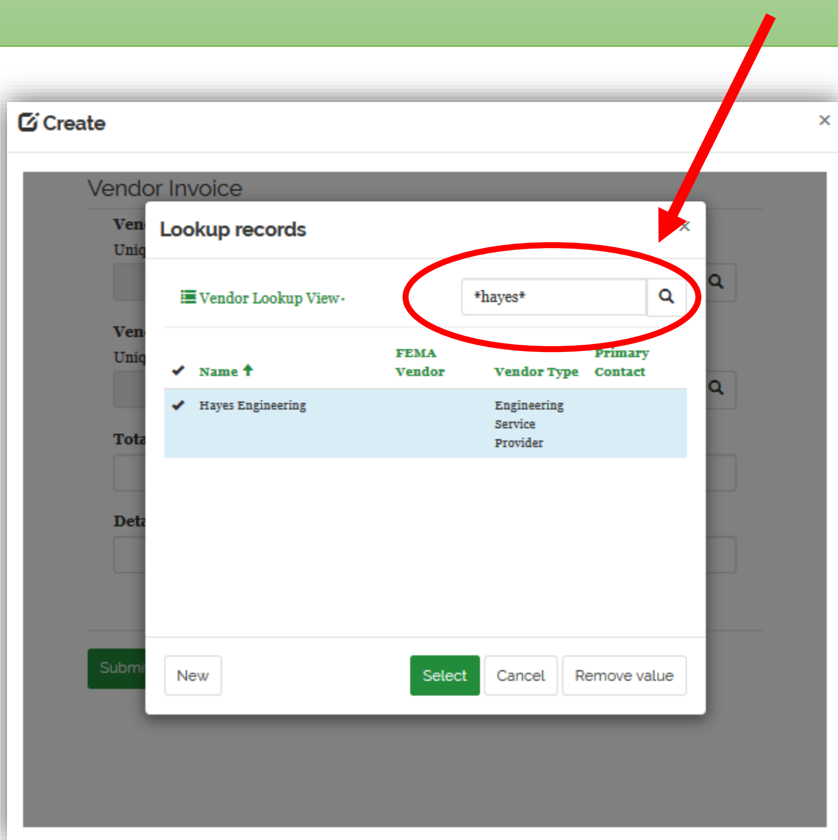
TIGR Tip: It is a good idea to enter the **Invoice Line Item(s)** into the system before you enter the **Payment Amount Requested**.

Select **Add Invoice Line Item**. This will provide you with the ability to select an invoice.

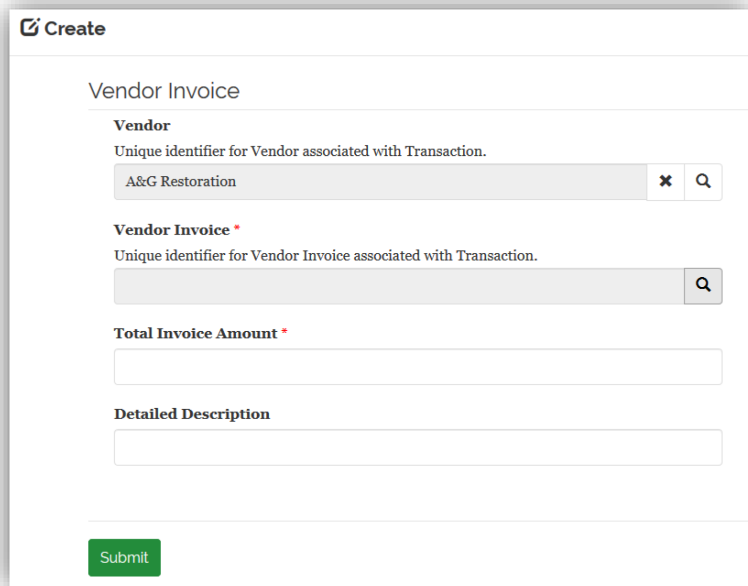
To begin to enter an Invoice Line Item, you must first search for and select the vendor.



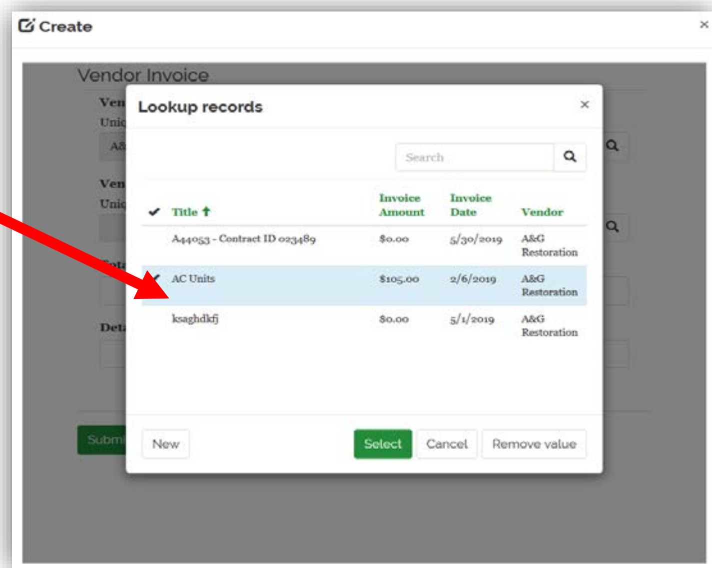
TIGR Tip: There are literally hundreds of vendors in the TIGR system. This is a great place to do a **Wildcard Search.**



Next search for the Vendor Invoice.

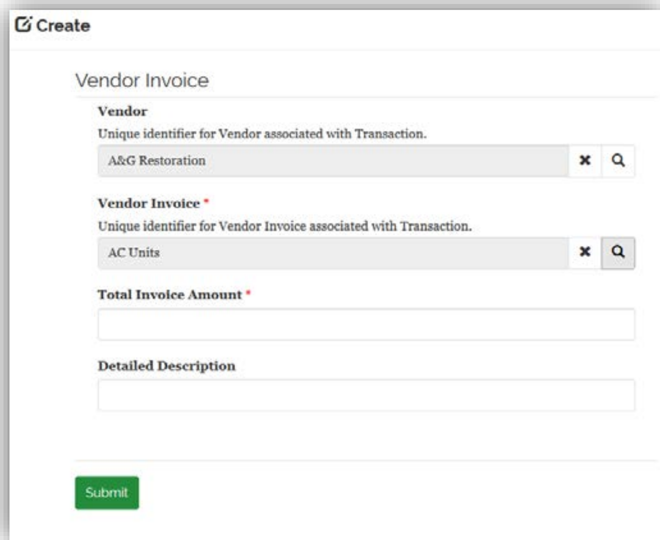


Chose the invoice from the list of previously-entered invoices for this vendor.



If you do not see the invoice you are wishing to use, then this invoice may not have been entered into the system yet. To add a new invoice to the system, go to:

Step 4a - Adding Invoices Not Already in The System



Create

Vendor Invoice

Vendor

Unique identifier for Vendor associated with Transaction.

A&G Restoration

Vendor Invoice *

Unique identifier for Vendor Invoice associated with Transaction.

AC Units

Total Invoice Amount *

Detailed Description

Submit

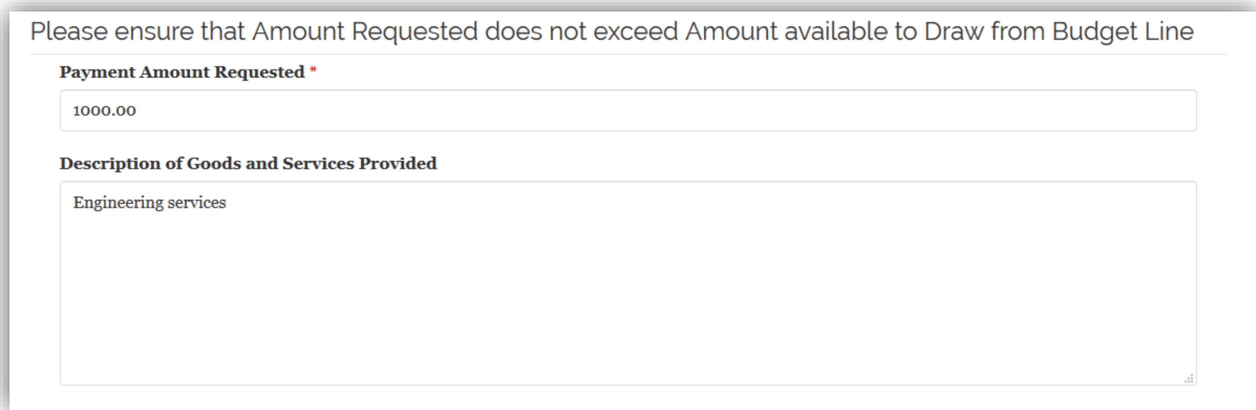
Finally, enter the payment amount for <u>this Invoice Line Item only</u>.

The title **Total Invoice Amount** may be misleading, <u>this should only the amount for this invoice line item</u> not for the whole invoice (unless it is a single-line invoice).

Include a detailed description of the invoice and click ***Submit***, which will return you to the **Modify Payment Request Line Item** page.

TIGR Tip: *Be careful entering the Invoice Line Item Amount. This value cannot be changed once the payment is submitted.*

Now, add the **Payment Requested Amount** and ***Submit***



Please ensure that Amount Requested does not exceed Amount available to Draw from Budget Line

Payment Amount Requested *

1000.00

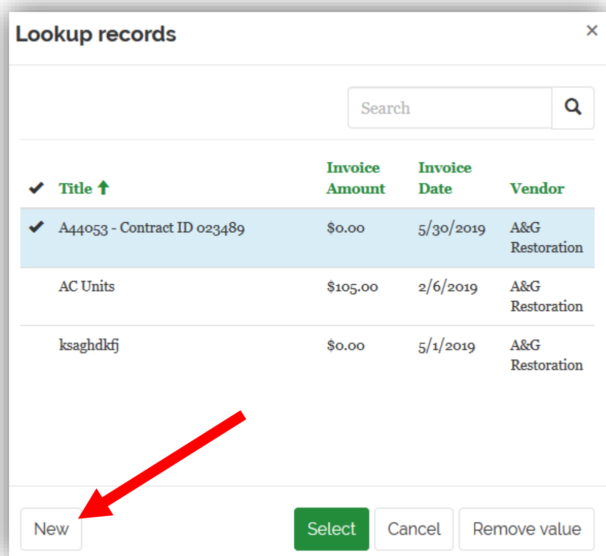
Description of Goods and Services Provided

Engineering services

If you have successfully entered and submitted the Payment Amount Requested, skip to Step 5: Upload Required Documents

Step 4a: Adding Invoices Not Already in The System

If this is the first line item on an invoice and the invoice has not yet been created, when the pop-up appears, select ***New*** at the bottom left to enter the invoice into TIGR.



To enter a new invoice for the first time, select the vendor.

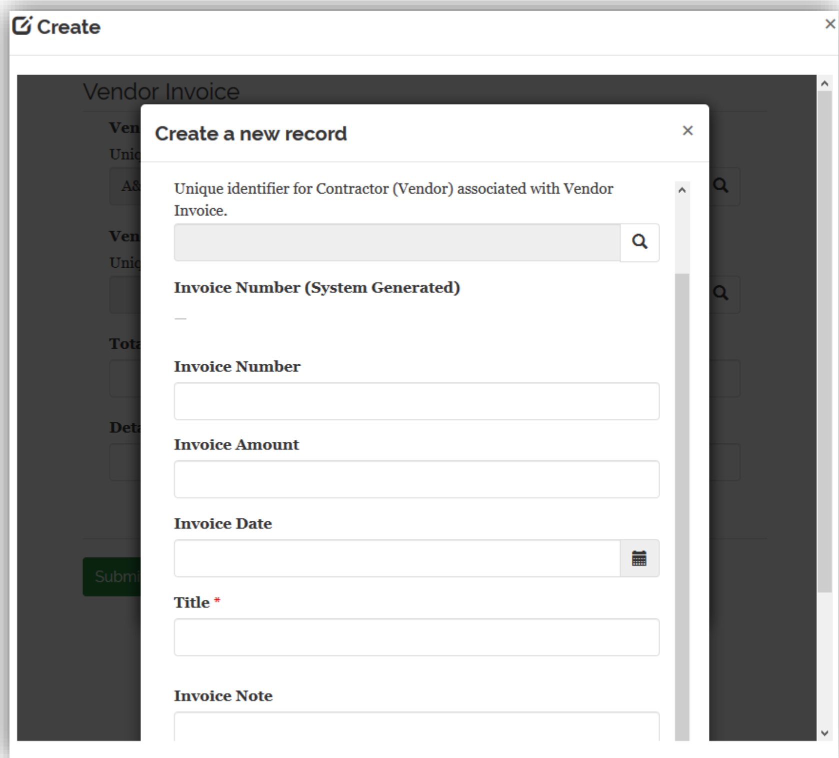
Enter the vendor's invoice number.

Enter the total dollar amount for the entire invoice in the **Invoice Amount** field.

Select the Invoice Date

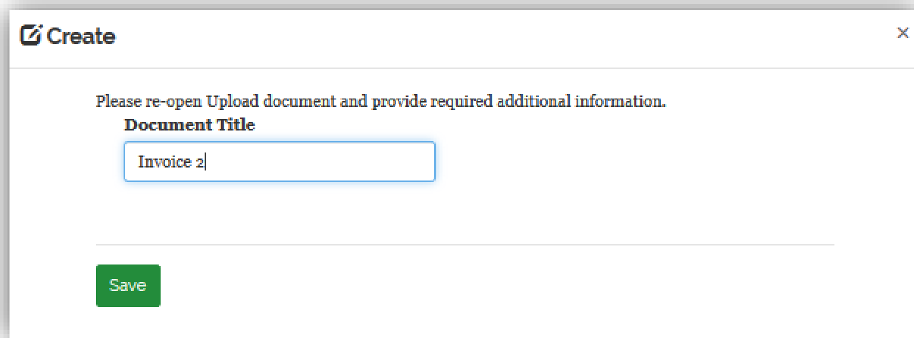
Enter a title for the invoice. This is important as there will be hundreds of invoices for this Activity in TIGR and we need a way of easily identifying them. So, for **Title** use the **Invoice Number – Last four digits of the work order**.

For Example: A19269-4032

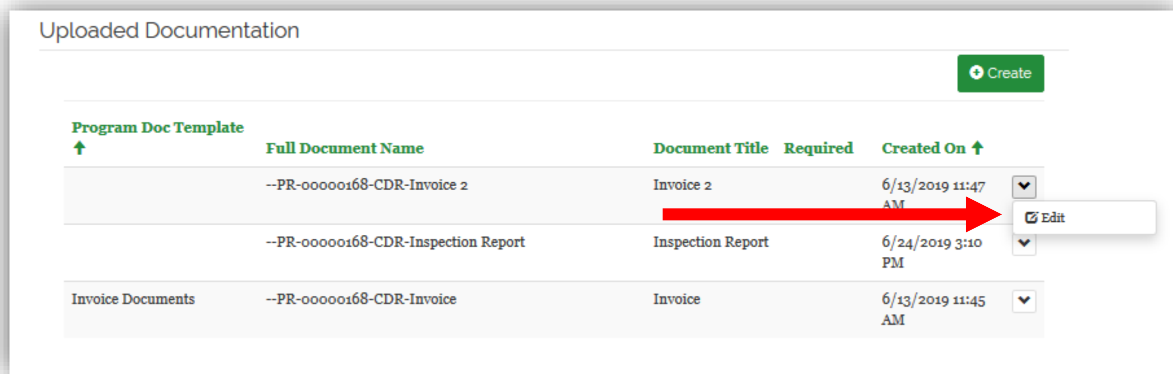


Step 5: Upload Required Documents

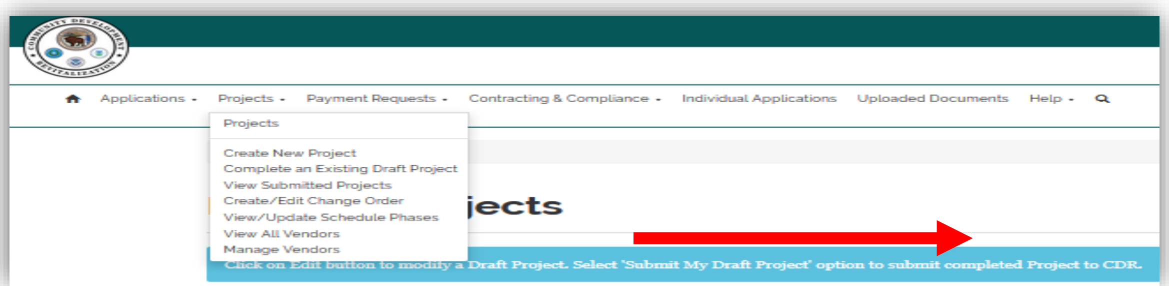
Now, upload all documents required for this payment. Using the ***Create*** button at the bottom right of the **Payment Request Details** page, enter the document title and save.



Click on the
arrow to the right of the record that was created and select Edit.

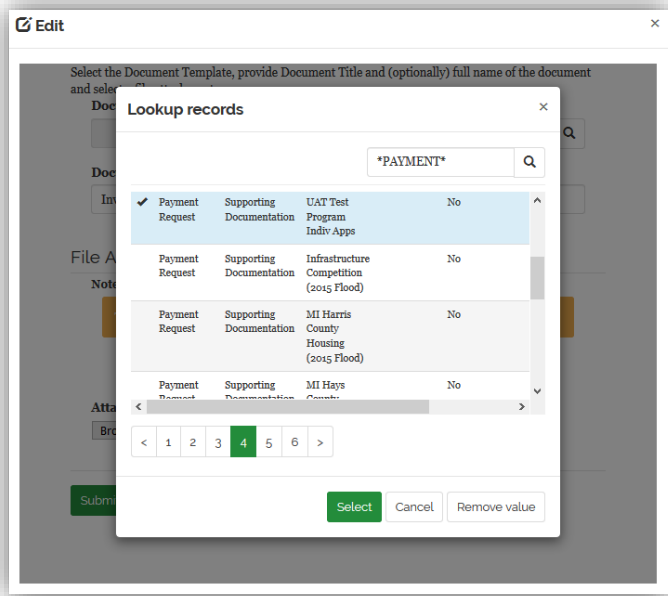


Next, select from among a pre-defined list of **Document Templates**. These templates are just a way to group similar documents. Each program has its own unique set of Document Templates based on the types of activities defined in programs Action Plan. To select from the list **of Document Templates**, click on the magnifying glass icon.



Page through the document types assigned to this Program and select the one most appropriate for the document that you are about to upload. If you have a question regarding the appropriate Document Template, contact your GLO Grant Manager.

Click next to the selected document type and then click **Select** to continue.

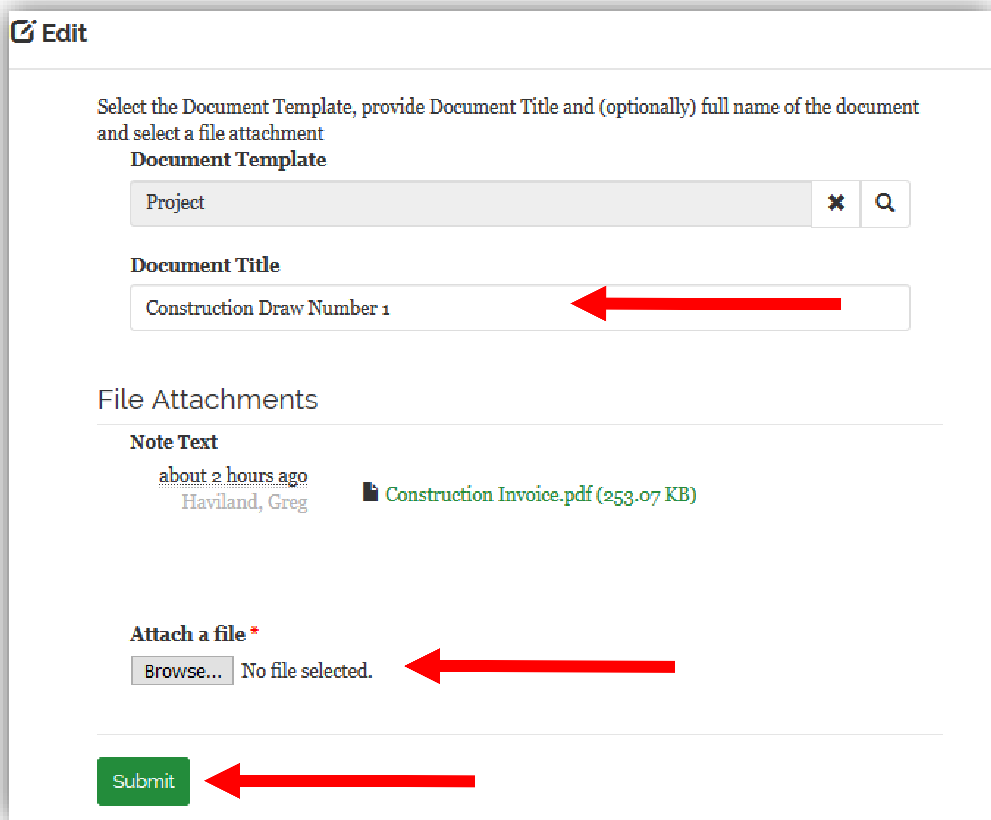


Enter the document title that you would like to have displayed

Select ***Chose File*** and select the file that you wish to upload

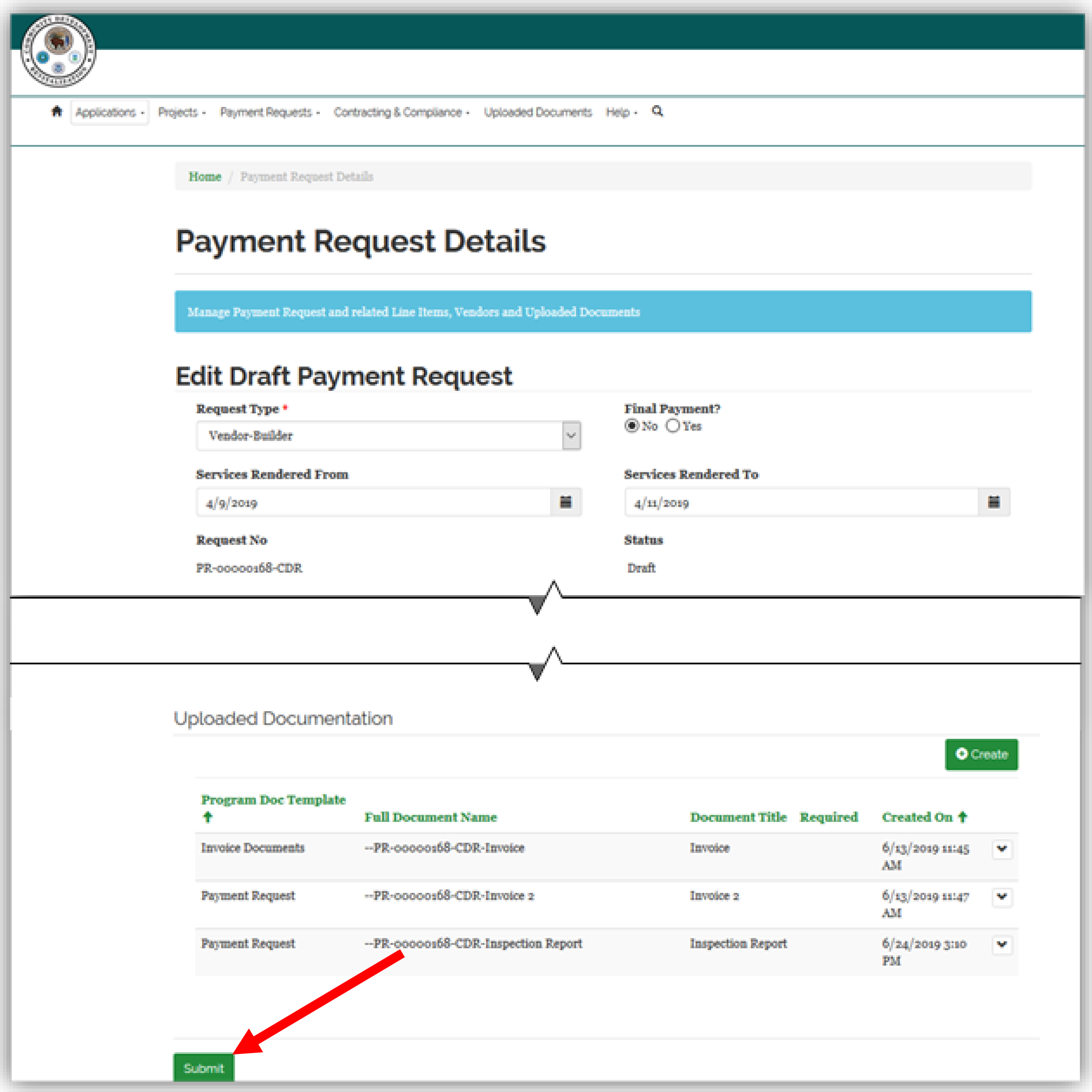
Select ***Submit*** to complete the upload

Repeat this process if additional documents are required.



Step 6: Initial Submission

Once all invoice line items have been created, all documentation has been uploaded, and the amount requested reconciles with the invoice line items, select ***Submit*** at the bottom of the **Payment Request Details** page. This completes the process of entering the Payment Request.

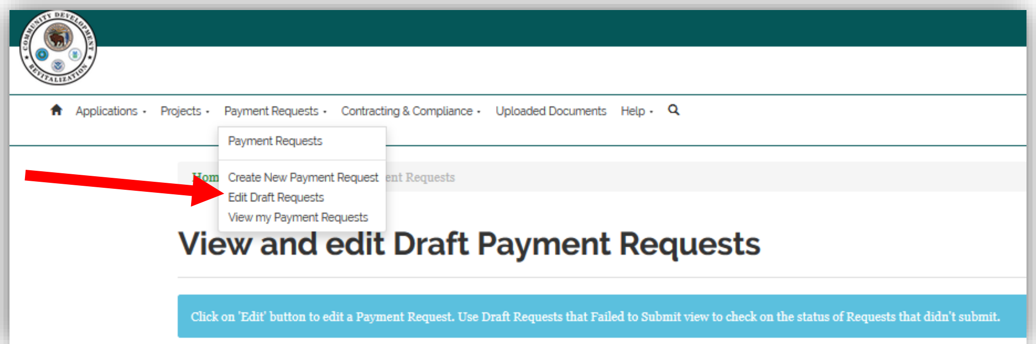


This, however, is NOT the Final Submission of the Payment Request.

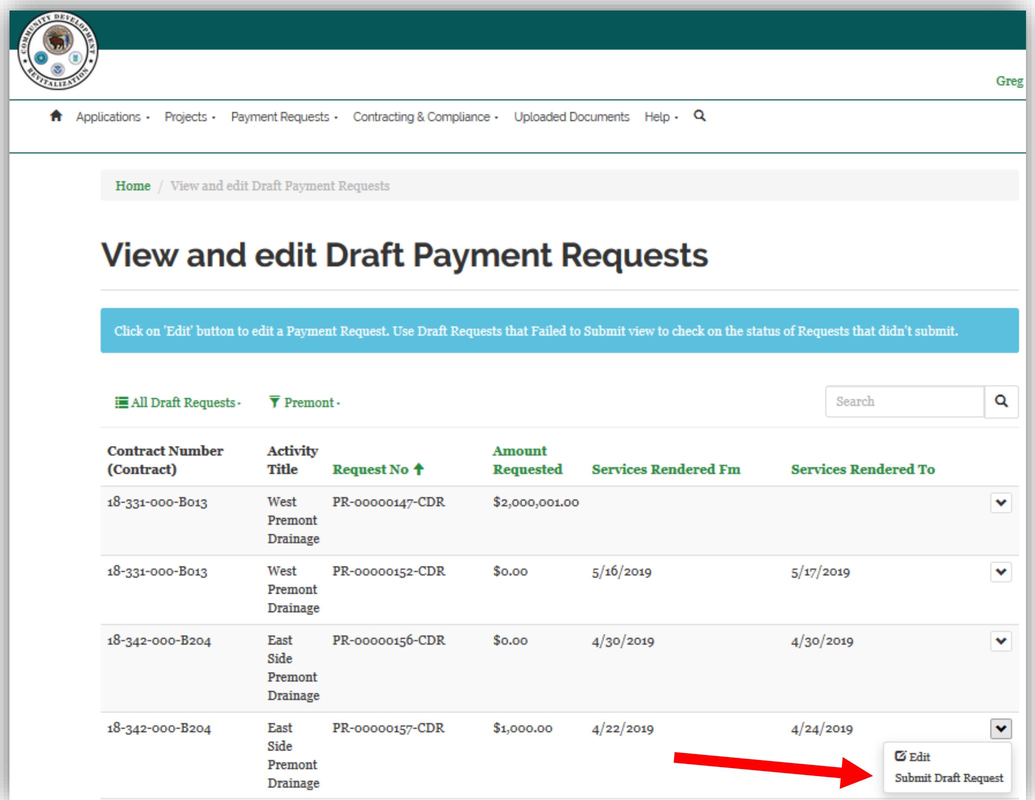
Step 7: Final Submission

You can change anything in an individual Payment Request until you perform this final Submission. You have not submitted the Payment Request until you have performed this final step.

For Final Submission return to the main menu and select **Edit Draft Requests**



This will pull a list of all Draft (unsubmitted) Payment Requests. To perform a final Submission,

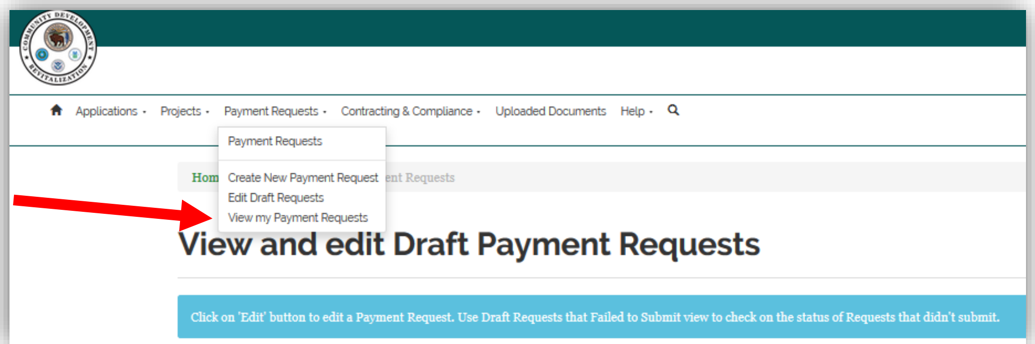


select **Submit Draft Request** from the drop-down menu for the desired Payment Request.

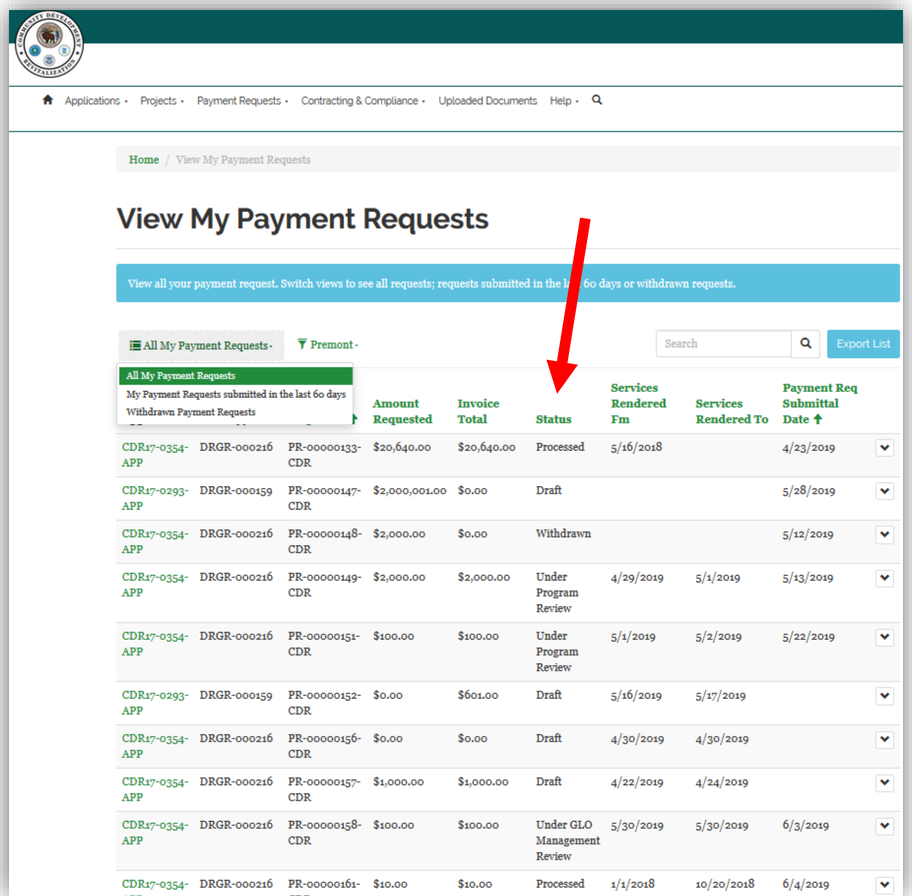
This completes the process of submitting a Payment Request for review and approval.

Step 8: Validating Final Submission

Once you have performed a Final Submission, you can check to see that the request has been successfully submitted. From the main menu, select **View My Payment Requests.**



If the status of your Payment Request is ***Under Program Review***, then it has been successfully submitted.



You can also use this landing page to track the status of all of your payment requests.