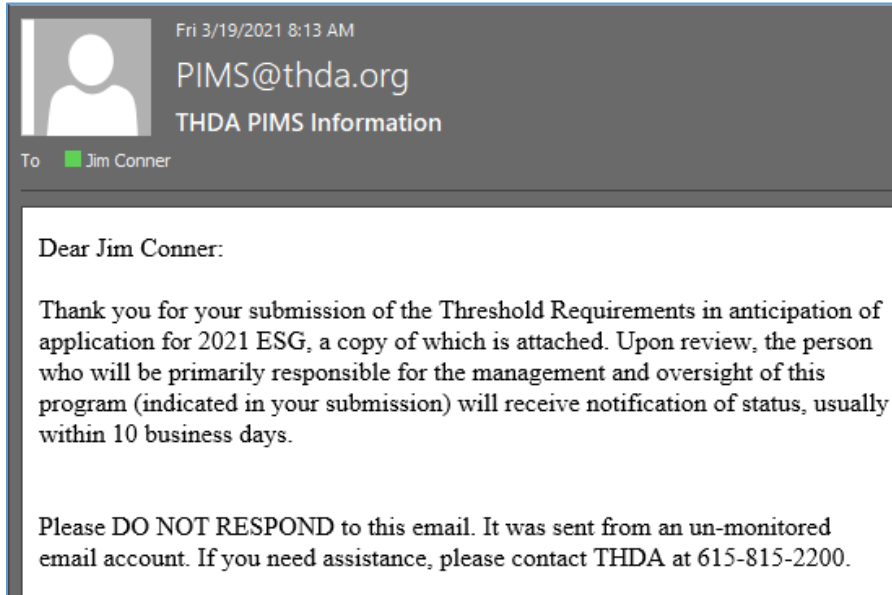


THDA GRANTS MANAGEMENT SYSTEM (GMS) ESG-CV-2 Set-Up Guide

Note: If you have an executed CV-2 contract you are already a CV-2 grantee, but you must complete these steps in order to create requests for payment within GMS.

START IN PIMS	
PIMS Resources	<ul style="list-style-type: none"> You will need a THDA Participant Information Management System (PIMS) account to access GMS Review the PIMS User Manual for New and returning grantees → Click to navigate to the manual on THDA's Website
PIMS Setup Notes	<ul style="list-style-type: none"> On the menu at the top of the page, click Threshold & Self Certification. Select this program from the dropdown list of programs: 2020 ESG CARES Act Part II (ESG-CV2) Upload all applicable documents and/or review previously submitted docs. You'll receive an auto-generated email upon submission of your threshold/review questions (see example directly below). <i>Remember you must wait for THDA staff to review your PIMS submission before you will be able to start Grant Setup in GMS.</i>
<p>Contact your ESG Coordinators at esg@thda.org with any questions about getting started with PIMS and/or GMS.</p>	<p>Example of auto-generated email from PIMS:</p> 

LOGGING IN

Welcome to GMS!

Navigate to
<https://gms.thda.org>

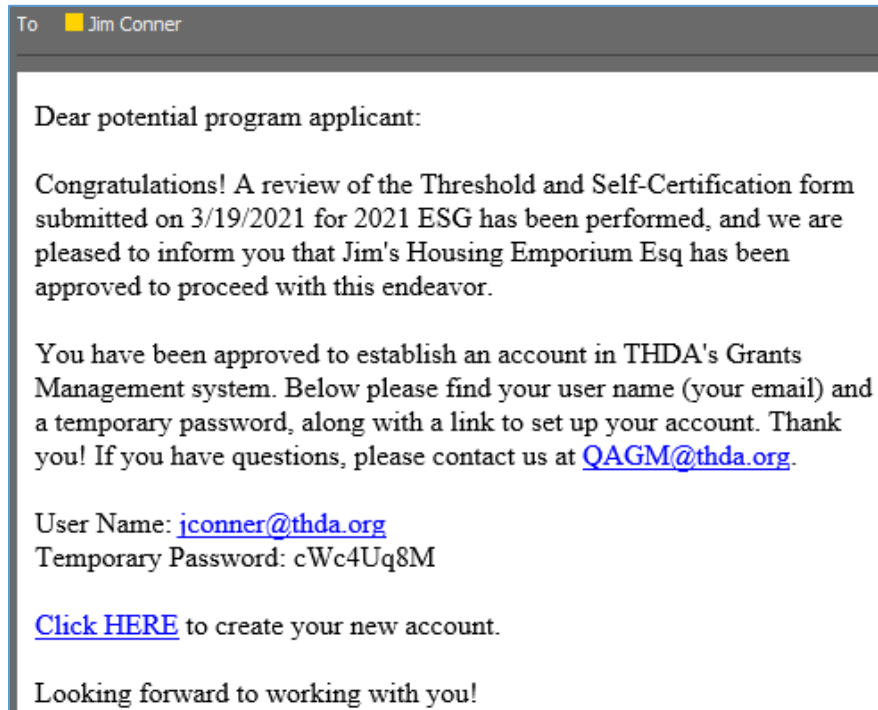


Use Google
Chrome
with GMS

Note: If you forgot your password, please use the "Forgot your password?" link. The system will lock you out **after 3 unsuccessful log-in attempts**.

Note: You should use the same **email address** for PIMS setup that you are using with GMS in order to avoid issues with GMS Setup process below.

- Upon approval of your **PIMS submission**, you'll receive an auto-generated email from GM@thda.org
- If you are a returning user, you will login normally, and your new program will be visible on your Home Screen.
- If you are a new user/agency, you will log in with a temporary password and set up your login credentials, then you will be taken to your Home Screen. Below is an example of the auto-generated email for **new** GMS accounts:



USER SETUP

Depending on the type of applicant, grant applications can have several people involved in the process. For any given grant, there could be:

- One or more employees at the county/city level/non-profit who actually enters the information.
- A project administrator working in conjunction with the applicant.
- The Mayor or Executive Director who will ultimately sign the application.

USER SETUP (Continued)

GMS allows you to assign each of these types of users with different permission levels.

Select Manage User to add or make changes to users permitted to work on the application.

Note: You will be automatically logged out after **30 minutes** of inactivity.

To add a new user:
Select the role type: Program Manager or Program User (read-only access).

Enter the user's email address.

Invite New User

Type: Email:

Program Manager
Program User

- ➔ Click Send and the new user will receive an email with log-in information inviting them to participate in GMS.
- ➔ Program Manager: Can edit/review/create draw requests, and can also *submit* the draw requests.
- ➔ Program User: Can edit/review/create draw request only.

To reset passwords or make changes to current users:

- Select the Edit button next to the user's name

Manage Existing Users

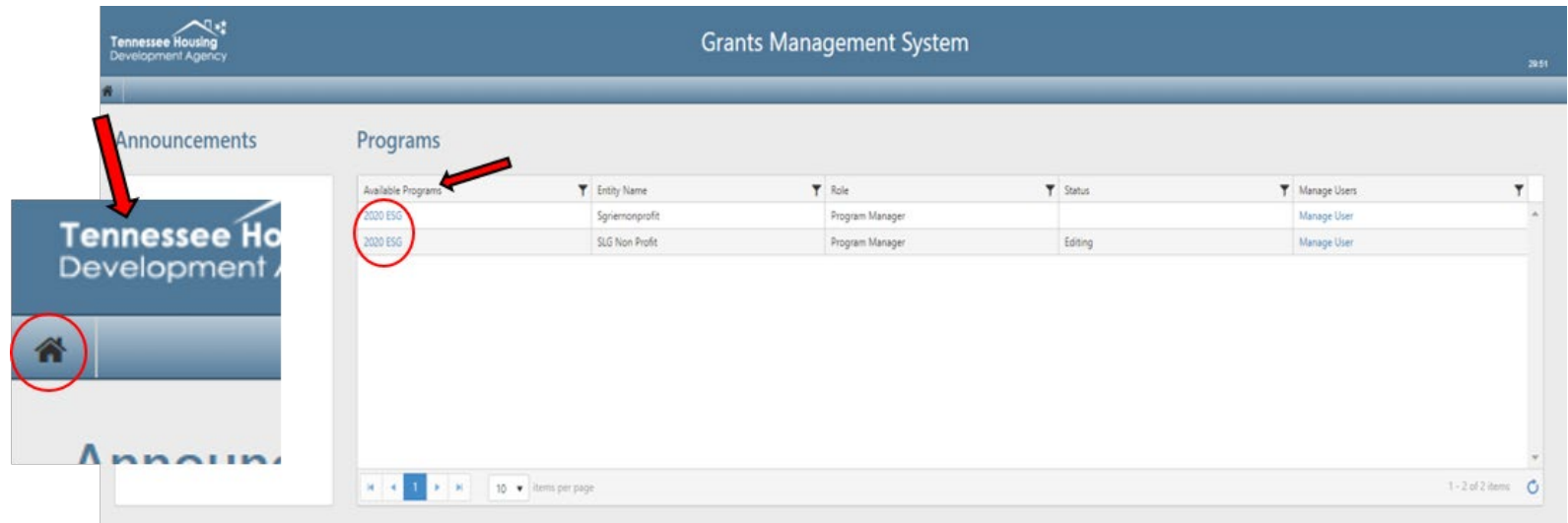
Program Name	Name (FN, LN)	Email	Entity	Role	Status	
Home 2019	Test ProgramAdministrator	TestProgramAdministrator@thda.org	Test Business 1	Program Administrator	Active	<input type="button" value="Edit"/> <input type="button" value="Reset PW"/>
Home 2019	Test ProgramManager	TestProgramManager@thda.org	Test Business 1	Program Manager	Active	<input type="button" value="Edit"/> <input type="button" value="Reset PW"/>
Home 2019	Test ProgramUser	TestProgramUser@thda.org	Test Business 1	Program User	Active	<input type="button" value="Edit"/> <input type="button" value="Reset PW"/>

- ➔ You cannot delete a user; you can only make them inactive.
- ➔ You cannot change someone's name or email address here. (Contact your THDA contact for help if you make an error.)

NAVIGATING THE PROGRAM

Click on the house icon in the upper left to return to the Home Screen. You can always access this button at any point in the application process.

Under the Available Programs header, click the link for the appropriate THDA program and application year to begin the application process.



The sidebar shows navigation links to various sections of the application.

*Please proceed thru the sections in order. Remember to complete the **Activity Costs** section according to your contract – your Activity Costs amounts should match your contract amounts.*

Program: 2020 ESG CARES Act Part II (ESG-CV2)

Application All item

Organization Type: Non Profit

Organization Legal Name: ABC Nonprofit

Main Office Street Address: [Field]

City: [Field] Zip: [Field] County: [Field]

☒ Mailing address same as office location

Federal Tax ID: 45-2365985 DUNS Number: [Field]

Federal Legislative District - House: [Field] State Legislative District - House: [Field]

Grantee Fiscal Year: [Field] to [Field]

[Save](#) [Next >](#)

SECTION 1 - APPLICATION

Enter the Applicant Organization's:

- Org Type & Legal Name
- Full Main Office Address
- Federal Tax ID
- DUNS #
- Federal Legislative District – House
- State Legislative District – House
- State Legislative District – Senate
- Select the Applicant's Fiscal Year using the drop-down calendar

Use the "Lookup" links to find your legislative districts. *Only input the district number.*

If you are a returning Grantee, your districts should already be populated in these fields.

Click Save, then Click Next to move onto the Contacts Section

Note: If you do not click the Save Button before moving to another section of the application, a warning will pop up. Changes will not be saved.

All grantees will have executed contracts by the time you're setting up in GMS – this streamlined application does not imply a tentative status to your grantee status.

All items in bold are required

Application

Organization Type

Organization Legal Name

Main Office Street Address **Street Address 2**

City **Zip** **County**

☒ **Mailing address same as office location**

Federal Tax ID **State Legislative District - House** **Lookup**

Federal Legislative District - House **Lookup**

Grantee Fiscal Year **to**

State Legislative District - Senate **Lookup**

Save **Next >**

Save **Next >**

Are you sure you want to do that?

You've made changes on this page which aren't saved. If you leave you will lose these changes.

Leave This Page **Stay Here**

SECTION 2 - CONTACTS

Click Add New Contact and a new Add/Edit Contact box will appear.

Complete all required fields, and then click the Update button to return to the Contacts section.

Complete this process for each application contact.

Street Address 2 and Cell Phone are not required.

Yellow warnings will appear for required fields if not added before trying to click Update.

Contacts All items in bold are required

1. Add all contacts to populate the selection in section 2 on this page. Only enter a contact once, no matter how many roles they may hold.

+ Add New Contact

Contact Name Company Name Email Phone Number

Add/Edit Contact

Prefix First Name Last Name Title

Company Name

Street Address Street Address 2

City State Zip

Phone Cell Phone Email

Application Contact

Signatory Contact

HMIS & Reporting Contact

After all your application contacts are added, select the appropriate person for **each** contact:

- Application
- Signatory
- HMIS & Reporting Contact

Click Save.

2. Make a selection for all contacts

Application Contact

Signatory Contact

HMIS & Reporting Contact

Made a mistake? Don't worry!

Once you enter a contact, new buttons will appear, which allow you to modify the entry, or delete the contact.

+ Add New Contact

Contact Name	Company Name	Email	Phone Number	
Jim Conner	Jim's Housing	dconner@thda.org	6158152159	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
David Conner	Jim's Housing	jconner@thda.org	6158152159	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

items per page

1 - 2 of 2 items

SECTION 3 – GENERAL INFORMATION

Answer all questions.

A domestic violence shelter is an example of a Victim Service Provider (VSP).

For the Service Area question, select all applicable counties from the drop-down list. The CoC(s) will auto-populate depending on which counties you select (see example). Selected counties will be highlighted blue in the list.

Note: If you select “Yes” for Prior State ESG Funding, new fields will appear. Select the Most Recent Year from the drop-down list and enter the amount awarded.

General Information

Is the Organization a Victim Service Provider? ☒ Yes ☐ No

What is your Service Area? Rutherford X Cannon X

Which CoC will be served by Applicant using these ESG Funds? Homeless Advocacy for Rural Tennessee, Murfreesboro/Rutherford County CoC

Faith-Based Organization? ☒ Yes ☐ No

Prior State ESG Funding? ☒ Yes ☐ No

Identify Most Recent **Year** 2012 ▼ **Amount** \$

Prior Local ESG Funding? ☒ Yes ☐ No

ESG Entitlement City

Will your project be located in a jurisdiction that prepares its own local consolidated plan? ☒ Yes ☐ No

Select your Jurisdiction(s)

Save Next >

SECTION 4 – Activity Costs

Input dollar amounts for each ESG Activity category you were funded for according to your contract

Make sure to complete the Activity Costs section (and Save)!

Match Sources are not required for the CV2 grant or application.

The Shelter filter totals based on the amounts entered in the subtotal sections.

Activity Costs

Street Outreach	\$ 10,000.00
Shelter	\$55,000.00
Essential Services + Operations	\$ 55,000.00
Shelter Rehab/Conversion	\$ 0.00
Temporary Shelter Acquisition Rehab/Conversion	\$ 0.00
Homelessness Prevention	\$ 20,000.00
Rapid Re-Housing	\$ 20,000.00
Data Collection (HMIS)	\$ 10,000.00
Activities Total:	\$115,000.00

 Save

Next >

- ➔ The majority of grantees funded for Shelter will only enter a \$ amount under “Essential Services + Operations”
- ➔ Reach out to esg@thda.org if you have questions about how to separate out the Shelter subtotals **before** you submit.

SECTION 7 – Validate & Submit

When all sections are validated with a green “✓,” click the Request Certification button at the bottom.

Fill out the Authorized Agent’s Name and email and click Send Request.

The Signatory will receive an email and has 10 calendar days (or by the application deadline) to review documents, the application summary, and sign.

Program: 2020 ESG CARES Act Part II (ESG-CV2)

Application
Contacts
General Information
Activity Costs
Validate & Submit

Validate & Submit

☒ Application ✓
✓ Application successfully passed validation.

☒ Contacts ✓
✓ Contacts successfully passed validation.

☒ General Information ✗
✗ General Information page has not been started.

☒ Activity Costs ✗
✗ Activity Costs page has not been started.

All incomplete sections will have a red “X” and complete sections will display a green “✓.”
If you see a red “X,” then you need navigate to that section using the sidebar and correct the issue.
When all sections are validated with a green “✓,” click the **Request Certification** button at the bottom.

If the signatory and/or applicant decide on changes, the application will need to be resubmitted.

After the certification request is sent, this screen shows where the application contact can cancel the application request and edit if changes need to be made before the signatory certifies the application.

Validate & Submit All items in bold are required

Print Export to Excel

Application ✓
Contacts ✓
General Information ✓
Activity Costs ✓

Request Certification

Certify Application

In order to complete this application, the authorized agent of the applicant must review, acknowledge and endorse the application in its entirety, prior to submission.

Please provide the email address of the authorized agent. The authorized agent will receive an email, which will provide a link to this account. This link will be active for **10 calendar days or until the application deadline**. The authorized agent is expected to review the completed application, acknowledge authority, and provide endorsement for submission. Once completed, you will be notified via email that authorization has been received, and the Submit button on the Validate and Submit page will become active. **Please remember that this application MUST be SUBMITTED by 3/31/2021!**

If for any reason you feel that that an email has been sent in error, you have the option of cancelling an email and/or resending. Simply click the Cancel button below, and re-enter the desired email to start this process over.

Authorized Agent

First Name Jim
Last Name Conner
Email Address jconner@thda.org

Send Request Cancel

After Send Request is clicked, this text will appear: A certification request has been sent to Jim Conner (jconner@thda.org). If this contact is incorrect please request certification to a new contact. Only the most recent certification link will be active.

The Authorized Agent will receive an email similar to the email on the right.

The Authorized Agent will follow the unique link to the application certification page where a PDF copy of the application is available.

The signatory will complete all fields and click the Certify button. The next page will say, ESG Application Certification Successful.

Example of certification request email as sent to Authorized Agent:

From: QAGMS@thda.org <QAGMS@thda.org>

Sent: Tuesday, March 30, 2021 10:08 AM

To: Jim Conner <JConner@thda.org>

Subject: ESG-CV2 Application Submission Approval Request

Greetings Jim Conner,

In your capacity as the authorized agent for ABC Nonprofit, and in compliance with the requirements of the ESG-CV2 Grant Application, please click below to review, certify and approve this year's application. If you have questions or concerns, please contact Jim Conner at jconner@thda.org or (615) 815-2200.

Please be aware that this link is temporary, and will expire 10 calendar days from the date of this email, or the 3/31/2021 application deadline, whichever comes first.

<https://qagms.thda.org/ESG/Certify/ZTQ0OGQ2YzUtMmI3Yy00ZDIwLTk4YjQrYmM0ZWQ4MTVjNDk1>

Once approved, you, as well as the Manager/Administrator, will receive acknowledgement through email, and the application will be released for submission by the Manager/Administrator.

Thank you!

After clicking the link, the Authorized Agent will be taken to this screen:

ESG Application Certification

Application Content

ESG Application Summary (PDF)

To the best of my knowledge, I certify that the information in this application is true and correct and that the document has been duly authorized by the governing body of the applicant. I will comply with the program rules and regulations if assistance is approved. I also certify that I am aware that providing false information on this application can subject the individual signing such application to criminal sanction up to and including a Class B Felony.

By signing this application for funds, I am also certifying that all documents required to be electronically uploaded to the THDA Participant Management Information System (PIMS) have been uploaded and that those documents reflect the most recent and complete documents available. All applications will be evaluated based on the supporting documents in the PIMS document repository as of the application deadline.

First Name	<input type="text" value="Jim"/>	Last Name	<input type="text" value="Conner"/>
Title	<input type="text" value="Emperor Dowager"/>	Certification Date	<input type="text" value="3/30/2021"/> 

After clicking Certify, this message will appear: Thank you! A confirmation email has been sent to the applicant and authorized agent.

<p>Applicant and Signatory contacts will receive an email that the application has been approved for submission.</p>	<div data-bbox="722 99 1814 610"> <p>From: GMS@thda.org <QAGMS@thda.org> Sent: Tuesday, March 30, 2021 10:16 AM To: Jim Conner Subject: ESG-CV2 Application Approved for Submission!</p> <p>Greetings:</p> <p>This will acknowledge that the ESG-CV2 Grant Application for ABC Nonprofit has been approved by the authorized agent, and is eligible for submission. Please remember that this application MUST be SUBMITTED by x/xx/2021!</p> <p>Thank you! If you have any questions or concerns, please contact us at 615-815-2200, or GMS@thda.org.</p> </div>
<p>The applicant then logs back into their ESG application and clicks the submit bottom (refresh the page if needed, too).</p> <p>An email titled “ESG Application Successfully Submitted!” will then be automatically be sent to the listed contacts.</p>	<div data-bbox="709 610 1814 1305"> <div> Validate & Submit All items in bold are re </div> <div> Print Export t </div> <ul style="list-style-type: none"> ▶ Application ✓ ▶ Contacts ✓ ▶ General Information ✓ ▶ Activity Costs ✓ <p>Application certified by Jim Conner on 3/30/2021.</p> <div> Submit </div> <p>After clicking Submit, this text will appear:</p> <h2>ESG Application Certification Successful</h2> <p>Thank you! A confirmation email has been sent to the applicant and authorized agent.</p> </div>

SECTION 8 – Validate & Submit (continued)

You'll see a date and timestamp once your application has been successfully submitted.

Refresh your screen if it doesn't show up automatically.

Validate & Submit

Application certified by Jim Conner on 3/30/2021.

Application submitted 3/30/2021 11:57 AM.

A system-generated email will also congratulate you on your successful submission.

Greetings:

Congratulations! You have successfully submitted your application for the ESG-CV2 Grant Program, administered by Tennessee Housing Development Agency (THDA).

Upon completion of the review process, you will be notified of the results. Good Luck!

Thank you! If you have any questions or concerns, please contact us at 615-815-2200, or QAGMS@thda.org.

SECTION 9 – Grant Setup

Now you've successfully submitted your application – wait for a response from THDA.

Once the application is reviewed, and funded Activity amounts are confirmed, then THDA will notify the grantee. At this time, the grantee will be able to navigate to their GMS 2020 ESG CARES ACT PART II (ESG-CV2) Program.
A new heading appears on the sidebar now: Grant Setup.

Select and upload each file:

- W-9
- Cert of Consistency with Local Consolidated Plan
- CARES Act Application
- Proposed Policy and Procedures
- Board Resolution for Policies and Procedures

[Click here for Forms](#)

Grant Setup

Document Upload Defaults:


- Max file size: 25 MB
- Allowed file types: PDF, DOC, DOCX, XLS, XLSX, GIF, JPG, JPEG, PNG, SHP, SHX, DBF, PRJ, KML, SBX, SBN, CPG, XML, DWG

Documents and forms provided by THDA can be acquired from here: [THDA Documents](#)

Documents

Date Approved

Executed Contract and Amendments

 21tnj09.pdf
Size: 196 KB
 ×

W-9 Form

Certification of Consistency with Local Consolidated Plan

CARES Act Application

Proposed Policy and Procedures

Board Resolution for Policies & Procedures

Expense Methodology:

- Volunteer Incentives
- Hazard Pay
- Landlord Incentives
- CV Training

If you plan to request for any of these CV-specific expenses, then answer yes, select a file, then click upload.

You will not be able to request reimbursement for these expense types until the relevant doc is uploaded and THDA-approved.

Expense Methodology

Will you be requesting any of the following expenses?


Volunteer Incentives

☒ Yes ☐ No

Volunteer Incentives Documents


Select files...

✓ Done

 21tnj09.pdf

Size: 196 KB

Upload Date: 3/31/2021 8:47 AM




Hazard Pay


☒ Yes ☐ No

Hazard Pay Documents

Select files...

 21tnj09.pdf

Size: 196 KB



Upload

Landlord Incentives

☒ Yes ☐ No

Landlord Incentives Documents

Select files...

Advance Funding:

Make sure you answer this question before moving thru Grant Setup.

Expense Methodology

Will you be requesting any of the following expenses?

Volunteer Incentives

☐ Yes ☐ No

Hazard Pay

☐ Yes ☐ No

Landlord Incentives

☐ Yes ☐ No

CV Training

☐ Yes ☐ No

Advanced Funding

Will you be requesting Advanced Funding?

☐ Yes ☐ No

Financial Information

This section must match what you have on file with THDA Accounting and in the State of Tennessee Edison system.

We use this information to generate our coversheets for your draw requests, so if it doesn't match exactly what Suppliers has on file, your draw will not be processed.

Financial Information

Remit to Information

Street Address 1

Street Address 2

City

State

TN

Zip

Financial Institution

Last FOUR digits of Account Number

DUNS Number

452365258

Fiscal Year Start Date

3/1/2021

Federal Tax ID

11-1111111

☐ Nothing has changed from prior ACH Submission.

Date ACH form sent to F&A

Save

Authorized Signatures for Requests

- After you submit a pay request, at least two authorized individuals will need to approve the pay request.
- On this screen you submit the 2-4 Names and Emails and appoint an Authorizing Individual to approve those signatures.
- Once you submit these Names/Emails to your Authorizing Individual, they will receive an email from GM@thda.org (make sure to check spam).
- Once they approve, reach out to esg@thda.org to approve your Authorized Signatures.
- With THDA Approval, you will see a new section "Create Draw Request" appear on the sidebar

Authorized Signatures For Requests For Payment

It is recommended that four signatures be shown to permit flexibility in making draw downs, but you must have a least two authorized signatures. Two signatures are required for each pay request submitted to THDA.

Name	<input type="text"/>	Email	<input type="text"/>
Name	<input type="text"/>	Email	<input type="text"/>
Name	<input type="text"/>	Email	<input type="text"/>
Name	<input type="text"/>	Email	<input type="text"/>

NOTE: THE CHIEF ELECTED OFFICIAL, BOARD CHAIR, OR EXECUTIVE DIRECTOR WHO AUTHORIZES MAY NOT BE ONE OF THE PERSONS AUTHORIZED TO SIGN A REQUEST FOR PAYMENT. IN OTHER WORDS, AN ELECTED OFFICIAL, BOARD CHAIR, OR EXECUTIVE DIRECTOR CANNOT CERTIFY HIS OR HER OWN SIGNATURE.

Authorizing Individual	<input type="text" value="Kristy"/>	Email	<input type="text" value="kristy@abc.org"/>
Role	<input type="text" value="Commission Chairper..."/>		
Approved By THDA	3/2/2021		
THDA Approver	Kristy Allen		

Submit

You've completed your initial GMS Setup for ESG-CV2 – Congrats!

Reference THDA's ESG webpage for resources related to Creating a Draw Request in GMS & Pay Request Documentation.

<https://thda.org/government-nonprofit-partners/emergency-solution-grants-esg-program>

Reach out to your Coordinators at esg@thda.org with any questions/concerns.

Grantees can request a meeting to help walk through GMS with THDA ESG Staff.