Residential Retrofit HO SharePoint Site

Purpose: Serves as a central repository for housing operators to upload invoices and payment requests, as well as locate documented program resources shared by MBI.

Direct link: https://masstechprod.sharepoint.com/sites/ResidentialRetrofitHOExternal*

*If you cannot access the SharePoint site or would like additional team members to have access, please contact Ariana Fielding (fielding@masstech.org).

Accepting the Invitation via Email

To access the site, you will have to accept an email invitation, which you should have received from Jessica Boulanger or Ariana Fielding.

Watch this helpful tutorial video for more details about how to accept the SharePoint invitation and navigate the site: Range Sharepoint Video .mp4.

Visiting the SharePoint Site

When you first visit the SharePoint site, it will open to the Home page (see Figures 1 & 2). The Home page contains the program description, followed by important dates and links to resources, such as the RANGE program website and the MBI Infrastructure Dashboard.

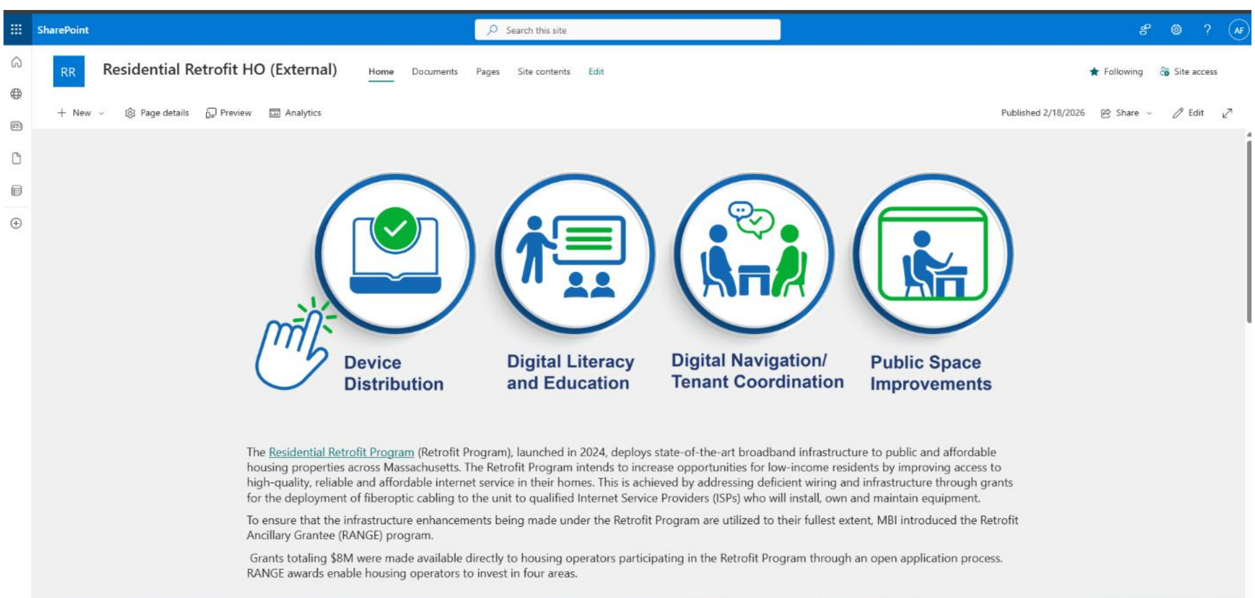

Figure 1

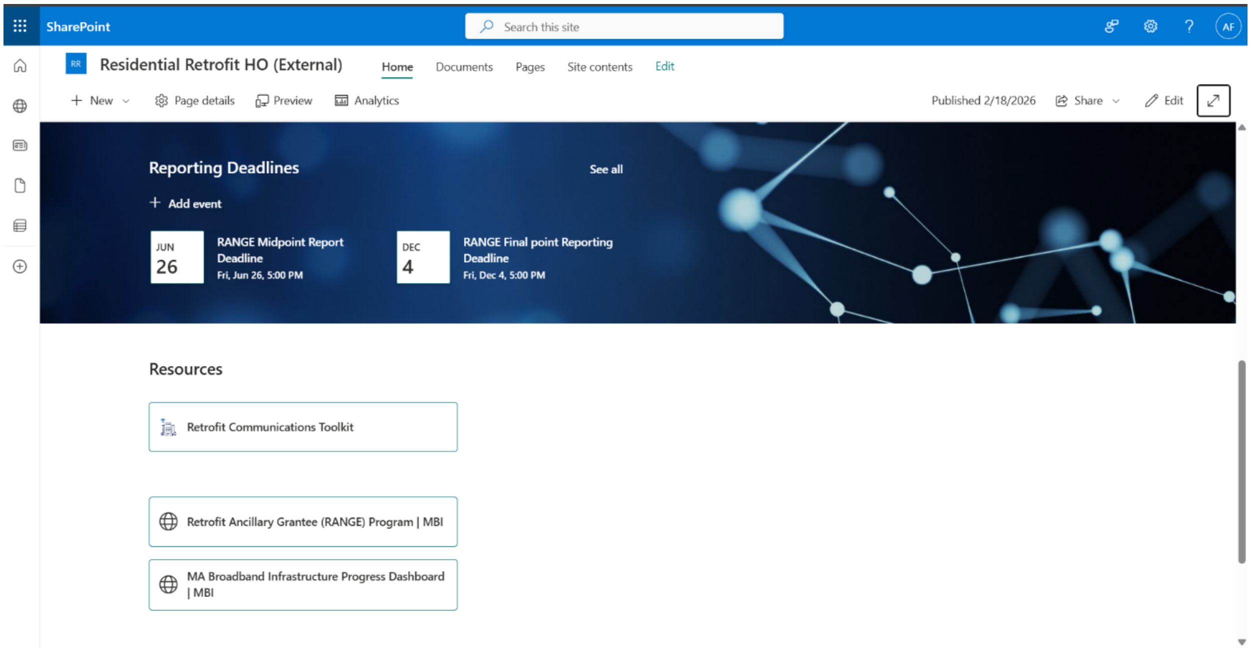

Figure 2

From the SharePoint site Home page, navigate to the menu options at the top (next to the site name) to select 'Documents' (see Figure 3).

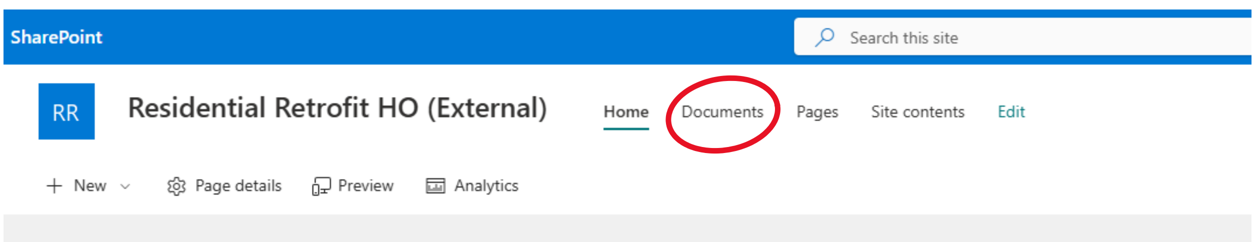

Figure 3

This is where you will locate your organization's designated folder within the relevant RANGE Cycle folder (see Figure 4). For example, if you received a grant under Cycle 1, your organization will have a designated folder in the RANGE Cycle 1 Invoicing folder.

There is also a General Resources folder containing helpful program documents.

Note: If your organization was awarded a grant under multiple cycles, there will be a folder for your organization within each relevant RANGE Cycle folder. Your RANGE grant contract(s) will list which properties are included under a given cycle.

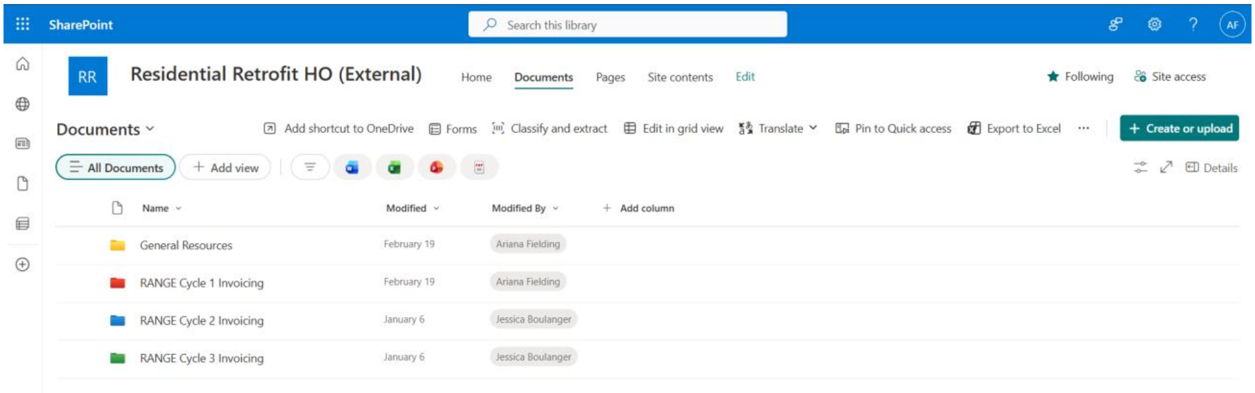

Figure 4

The General Resources folder contains the following documents for grantees to reference as needed (see Figure 5):

- ACH Welcome Template (Word doc)
- MBI RANGE Budget Template (Excel)
- RANGE Cycle 1 Reporting and Invoicing Webinar slides (PDF)
- RANGE Cycle 2 & 3 Reporting and Invoicing Webinar slides (PDF)
- RANGE Invoice Package Guidance (PDF)
- RANGE Program Reporting Requirements – Mid-point (PDF)
- RANGE Program Reporting Requirements – Final (PDF)
- Required forms for RANGE Invoices (Word doc)
- Sample Invoice Template Submission for RANGE grants (Word doc)

Additional documents may be added to this folder based on feedback from grantees about helpful resources.

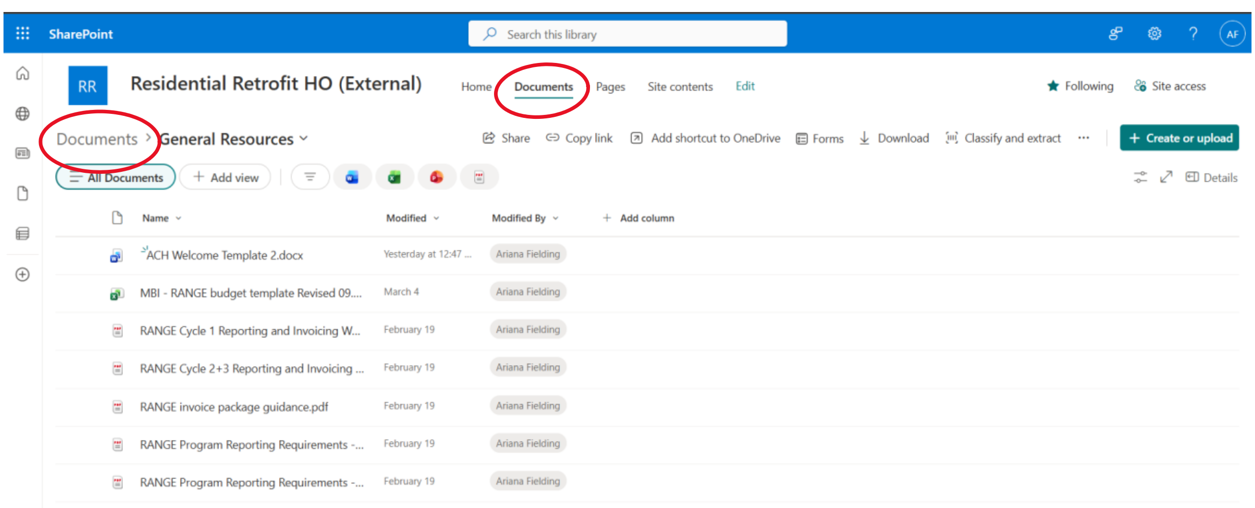

Figure 5

To access your organization's specific folder, return to the main documents page by clicking 'Documents' either in the top menu bar or to the left of the name of the folder you are currently in (see Figure 5).

From there, click on the name of the folder corresponding to the RANGE cycle under which your organization was awarded. For this example, the RANGE Cycle 1 Invoicing folder was selected (see Figure 6). Within the RANGE Cycle 1 Invoicing folder, there are four additional folders – one for each housing operator awarded under cycle 1.

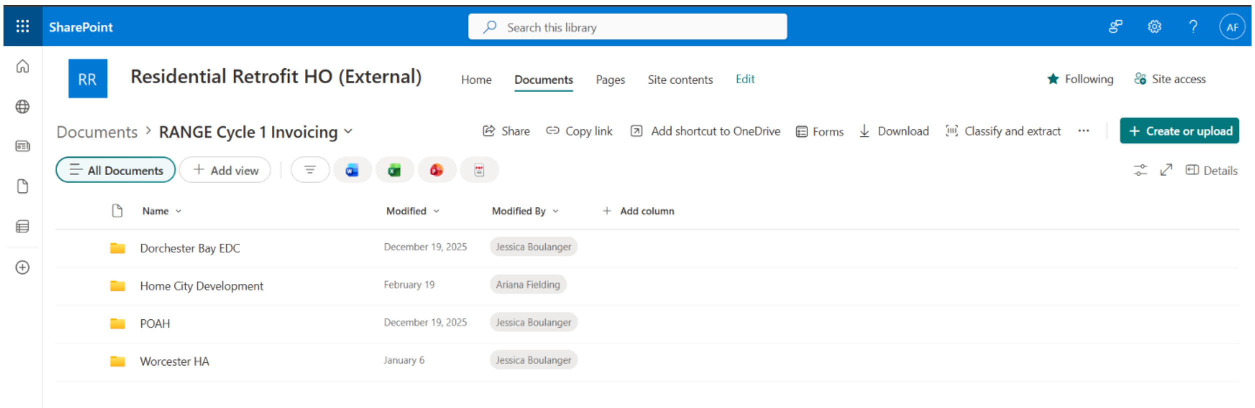

Figure 6

When one of the housing operator folder is selected, it will open to that organization's list of properties in the RANGE program (see Figure 7). The organization's fully executed grant agreement is also saved to this space.

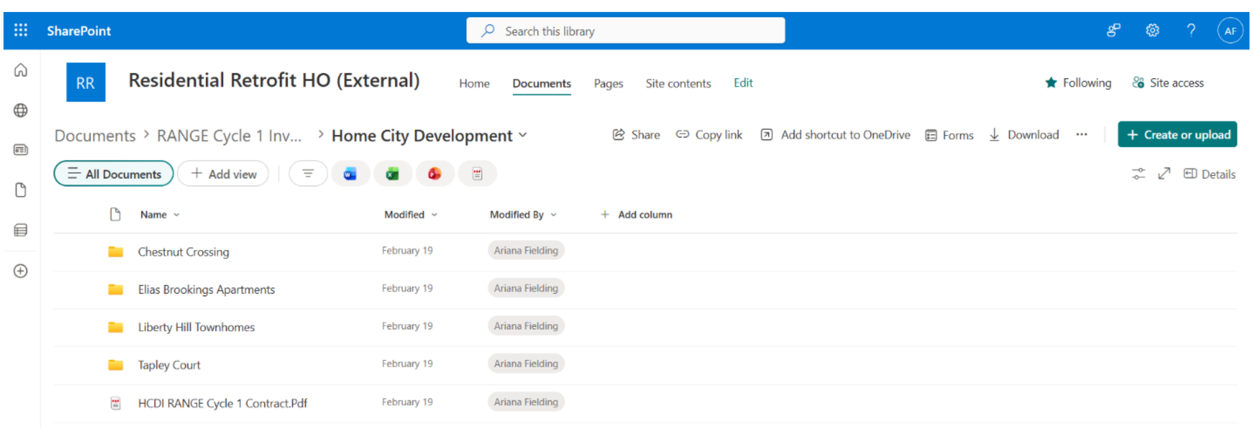

Figure 7

When you click on one of the properties in your organization's folder, it will open to a set of invoice folders and the budget excel file for that property (see Figure 8). You will use these invoice folders to organize reimbursement or advanced payment requests, according to the RANGE Invoice Package Guidance.

Note: If you include multiple properties in one invoice package, you may upload the package to one of the relevant property folders. You will not need to copy the same package into each separate property folder.

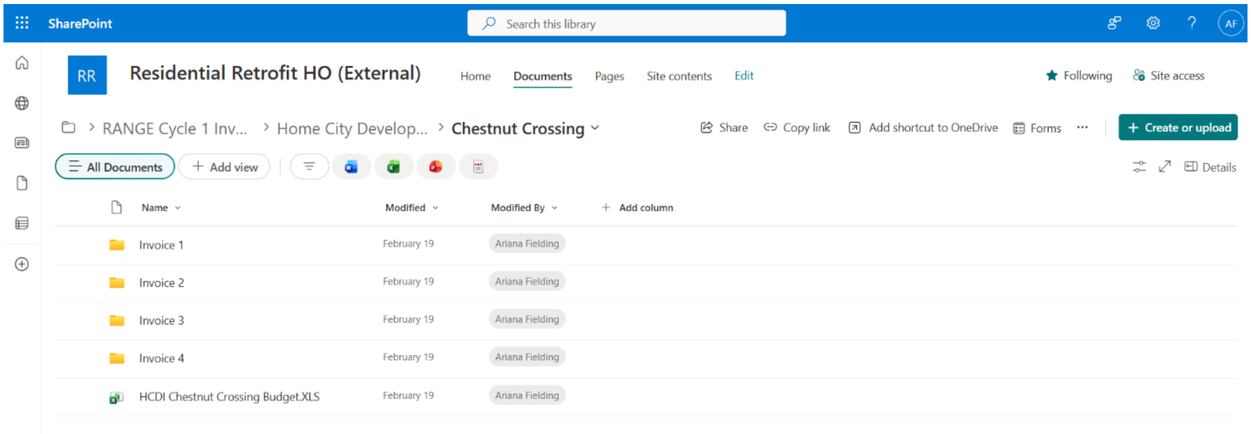

Figure 8

If your organization does not have multiple developments under the same RANGE cycle, the organization folder will open directly to the set of invoice folders, along with the budget excel file for the awarded property and the fully executed contract (see Figure 9).

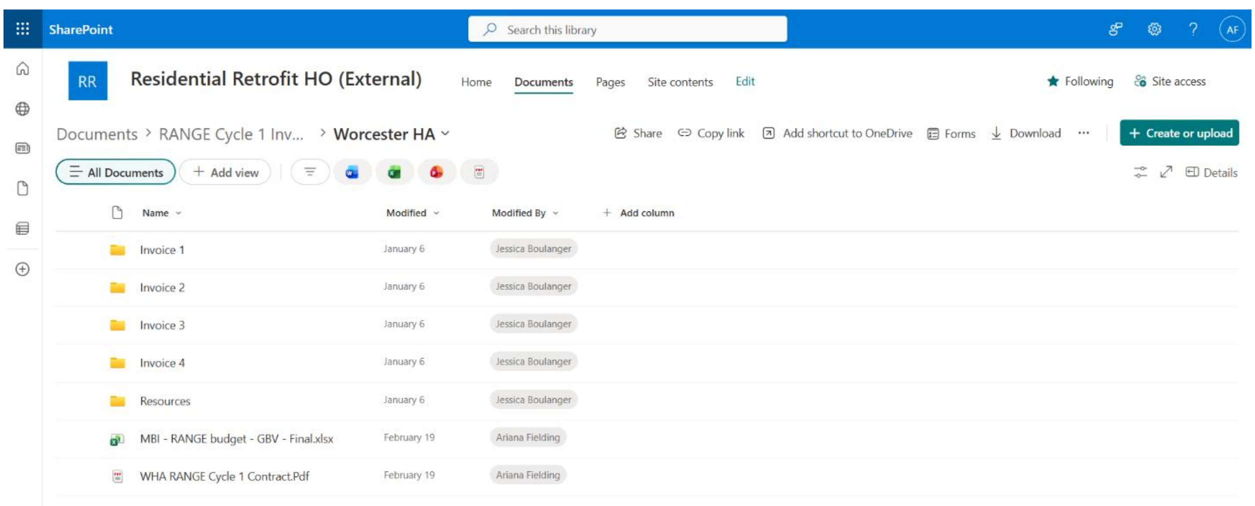

Figure 9

To upload your first invoice package, first compile all the necessary documents in to one PDF file and save it somewhere that you will be able to easily access it again. Next, click the Invoice 1 folder for the appropriate property to open the folder (see Figure 10).

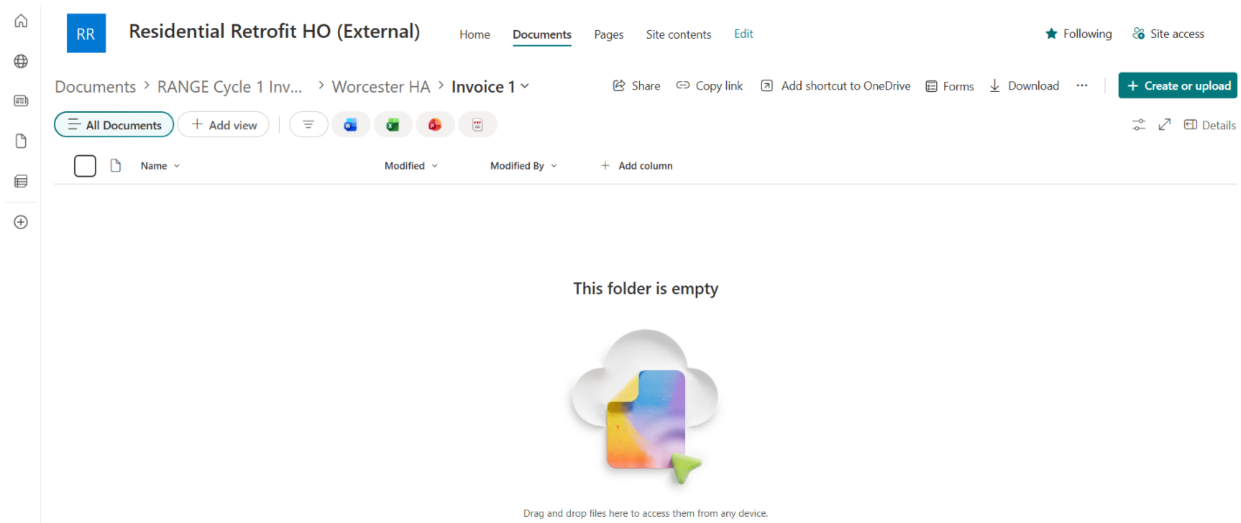

Figure 10

Here, you have two options for uploading the PDF file.

- Option 1: Open your system's file explorer. Locate the invoice package PDF, click and drag the file to copy it into the invoice folder (see Figure 11).
- Option 2: Click 'Create or upload,' then select 'Files upload' (see Figure 12). This will open your system's file explorer, where you will locate and select the invoice package PDF, then click 'Open' in the lower right corner of the window.

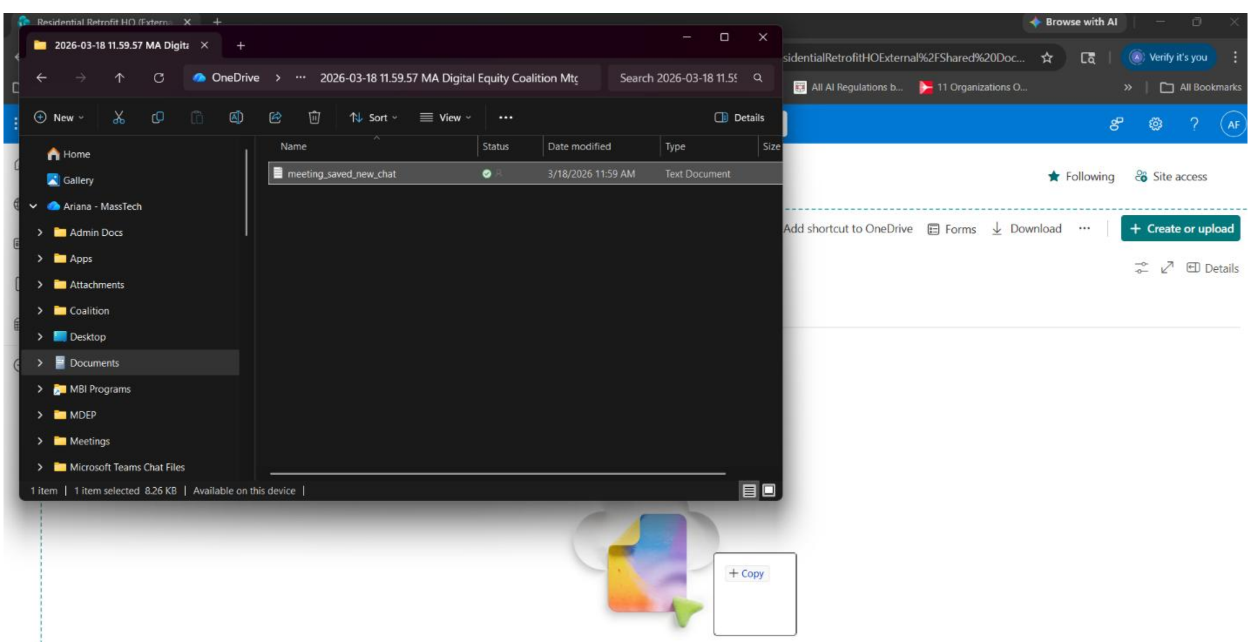

Figure 11

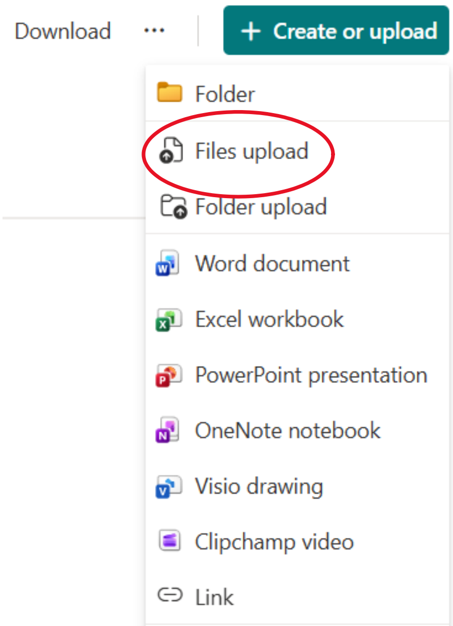

Figure 12

Note: You will notice that within each property folder, there are currently only four invoice folders (Invoice 1, Invoice 2, etc.). If you need to submit more than four invoice packages for a given development, you may use the 'Create or upload' feature to create new folders for additional invoices. Please use the same naming conventions when doing this (Invoice 5, Invoice 6, etc.).