

Client Portal Instructions for MI-STEP or MI-PEP

Export Client Portal Link: <https://medc.secure.force.com/SiteLogin>

REIMBURSEMENT GUIDELINES:

- Reimbursement must be submitted via the MEDC Customer Portal within 45 days* of the end date of your MI-STEP or MI-PEP export activity, unless otherwise notified by MSF/MEDC representative.

The 45 day window **does not apply for export activities approved and taking place on or after August 15th. Grants approved on or after August 15th MUST BE SUBMITTED for reimbursement by the second Friday in October. No exceptions.*

RECEIPT REQUIREMENTS:

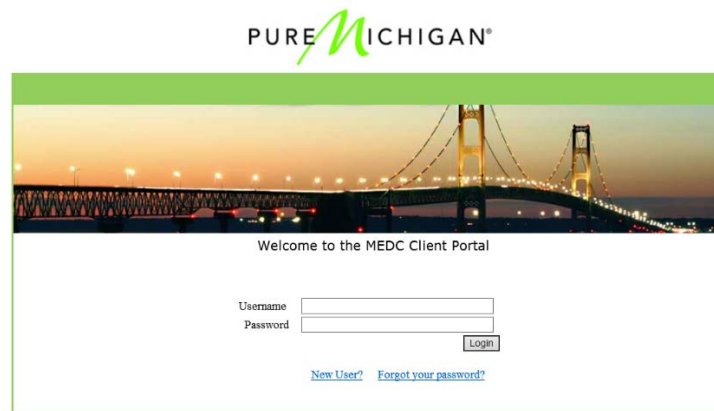
- **Detailed/Itemized receipts/invoices** are required for reimbursements, credit card statements alone are not acceptable.
- **Hotel receipts must be itemized.** Only lodging fees should be submitted in the lodging budget category. Any other fees (i.e. parking, laundry) should be removed and placed in the proper budget category.
- **Proof of Payment:** invoices/receipts must be accompanied by a proof of payment. Cleared checks, credit card statements, zero balance/paid in full invoices, or wire transfer documents are acceptable proofs of payment.
- **Foreign currency receipts:**
 - Currency conversions must be clearly documented on **each individual receipt**. Currency conversions must be done using the date that the expense was incurred, as currency rates fluctuate daily.
 - **Foreign currency receipts not converted and clearly documented on the individual receipts WILL NOT BE PROCESSED AND WILL BE CONSIDERED INELIGIBLE FOR REIMBURSEMENT.**
 - Foreign language receipts must have a description written on the individual receipt if it is not blatantly obvious what the receipt is for (i.e. taxi, train, bus, etc.). If a description is not indicated and the compliance auditor cannot determine what the expense is for, the receipt **WILL NOT BE PROCESSED AND WILL BE CONSIDERED INELIGIBLE FOR REIMBURSEMENT.**
 - If the exchange rate determined by your credit card company is being used, the credit card statement indicating the exchange rate must accompany your expense receipt. If a credit card statement showing exchange rate is not available, please use <http://www.oanda.com/currency/converter/> as the exchange rate calculator to determine US currency for requesting reimbursement.
- MI-STEP/MI-PEP does not reimburse for meals, alcohol or entertainment expenses; these itemized costs must be REMOVED from any submitted receipts.
- MI-STEP/MI-PEP does not reimburse for bank transaction fees (i.e.: wire transfer) or credit card currency conversion fees.
- MI-STEP/MI-PEP only reimburses gasoline expenses for rental cars. Mileage using the Federal Per Diem rate is used for any ground transportation when driving to an approved export activity. Proof of mileage must accompany the expense request.
- Submit receipts in a **legible**, electronic format - .pdf format is preferred. Receipts that are not legible will be considered ineligible for reimbursement and will not be processed. Please avoid submitting .jpeg or .png files if at all possible. A single scanned receipt packet is preferred over uploading multiple individual files.

REIMBURSEMENT SUMMARY WORKSHEET INSTRUCTIONS:

- The Budget Summary Spreadsheet must be completed with **separate line items for each submitted receipt**. This summary spreadsheet is included in your approval notification email in excel format.
- Requested reimbursement amounts listed on the spreadsheet must have corresponding documentation (see 'Receipt Requirements' above).

To submit your reimbursement request to the portal is a **simple 10 step process**. Please follow the directions below to do so. Please make sure that you complete all 10 steps of the process. Not doing so can significantly delay the processing of your reimbursement request. Export Client Portal Link: <https://medc.secure.force.com/SiteLogin>

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Once you have signed in, you will see the welcome screen.

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Please note that you have the ability to save and continue filling out the required information at a different time

1. Click on My Awards
2. Click on the appropriate incentive number under the Awards section. You can find your incentive number is in your approval email.

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This screen displays all Awards associated to your Account. Click on the link in the Awards column on the far left to access a specific Award where you will be able to perform monitoring activities, including requesting disbursements and submitting metrics.

If your Award is related to the 21st Century Jobs Fund program, refer to the Portal Reporting column. A check mark on a specific Award row denotes the record you should access for the applicable Progress Report that will capture all of the required information for that program

Awards	Opportunity	Stage	Program	Account Name	Application	Portal Reporting	Start Date
INC-00065249	Outsiders, Inc. - TEST CD ProjInfo Path	C Commitment	CDBG - 2014	Outsiders, Inc.			
INC-00065252	Outsiders Inc. - 2017 STEP Fabtech Mexico	D Monitoring	MI-STEP-2017	Outsiders, Inc.			8/2/2017

3. Click on the Milestones tab.

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Incentive INC-00065252

General Information Program Metrics **Milestones** Collaborators Disbursement Schedule Disbursement Request Documents Budget

Milestones

Milestone	Disbursement Schedule	Title	Status	Due Date	Type	Start Date	Milestone Completion Date
M-0000099777	DS-00031220		Not Started	9/30/2017	Export Reimbursement Milestone	8/2/2017	9/30/2017

4. Click on the appropriate Milestone number.
 - a. Click the edit button

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M-0000099777 [Edit](#) [Submit](#) [Instructions ?](#)

Export Activity Name Status ☐ Not Started

New Market(s) Entered? Due Date 9/30/2017

If other, please specify Activity Start Date 8/2/2017

Export Sales Generated from Activity Activity End Date 9/30/2017

Export Sales Projected from Activity Number of contracts/distributor agreements signed

What type of United States Department of Commerce Briefly describe the highlights of the activity, how participation

5. Complete the fields in the Milestone Information and Survey Contact sections (see next page). Please note that the fields with a **red bar** are required to be completed. **Hit the Save button.** You must hit the **Save** button in order to prompt the milestone attachment segment. This is where you will upload your receipts and reimbursement summary worksheet.

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Milestone Information

Export Activity Name Status ☐ Not Started

New Market(s) Entered? Due Date 9/30/2017

If other, please specify Activity Start Date 8/2/2017 8/2/2017

Export Sales Generated from Activity Activity End Date 9/30/2017 8/2/2017

Export Sales Projected from Activity Number of contracts/distributor agreements signed

What type of United States Department of Commerce (USDOC) services did you receive? Briefly describe the highlights of the activity, how participation impacted or will impact company sales or performance, and any additional feedback

Number of Meetings Participated in Please list the companies you met with, their industries, and details regarding the meeting

Survey Contact

Survey Contact First Name Survey Contact Last Name

Survey Contact Email I certify to the best of my knowledge that the information submitted is true and correct. ☐

Travelers

Account Traveler	Non Account Traveler	Title	Phone #	Email	Actually Traveled	Comments
Ponyboy Curtis				gomezj@michigan.org	--No--	

Export Sales Generated and Export Sales Projected may be entered as "0" if unknown.

6. Attach the required reimbursement request documents to the Milestone, which include a completed **Budget Summary Spreadsheet and acceptable forms of itemized and currency converted receipts.**
 - a. Click Add (see screen shot below)
 - b. Click Browse (find your file on your computer)
 - c. Select your file
 - d. Click Open
 - e. Click Save
 - f. Repeat if your receipts and reimbursement summary worksheet are not in one combined .pdf document
 - g. One .pdf document is the preferred method of expense submission. Please avoid using picture format files.

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Incentive
INC-00065252

General Information	Program Metrics	Milestones	Collaborators	Disbursement Schedule	Disbursement Request	Documents	Budget
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M-0000099777

Edit

Submit

Instructions ?

Export Activity Name	Fabtech 2017	Status	Pending
New Market(s) Entered?	--None--	Due Date	9/30/2017
If other, please specify		Activity Start Date	8/2/2017
Export Sales Generated from Activity	\$0.00	Activity End Date	9/30/2017
Export Sales Projected from Activity	\$120,000,000.00	Number of contracts/distributor agreements signed	
What type of United States Department of Commerce (USDOC) services did you receive?	None	Briefly describe the highlights of the activity, how participation impacted or will impact company sales or performance, and any additional feedback	
Number of Meetings Participated in		Please list the companies you met with, their industries, and details regarding the meeting	

Survey Contact

Survey Contact First Name	John	Survey Contact Last Name	Smith
Survey Contact Email	smithj@outsiders.com	I certify to the best of my knowledge that the information submitted is true and correct.	<input checked="" type="checkbox"/>

Travelers

Account Traveler	Non Account Traveler	Title	Phone #	Email	Actually Traveled	Comments
Ponyboy Curtis				gomezj@michigan.org		

Milestone Attachments

Add

Action

FileName

Milestone Attachments	Save	Cancel
File	Browse...	
Comments		

Milestone Attachments	Save	Cancel
File	C:\Users\sandborn\Desktop\2017 FABTECH Expense... Browse...	
Comments		

7. Once all the Milestone requirements have been completed, select the **“Submit”** button at the top of the screen. **Please note that your request is not formally submitted until this action has been completed.**

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Export Activity Name	Fabtech 2017	Status	Pending
New Market(s) Entered?	--None--	Due Date	9/30/2017
If other, please specify		Activity Start Date	8/2/2017
Export Sales Generated from Activity	\$0.00	Activity End Date	9/30/2017
Export Sales Projected from Activity	\$120,000,000.00	Number of contracts/distributor agreements signed	
What type of United States Department of Commerce	None	Briefly describe the highlights of the activity how participation	

8. Click on the Disbursement Schedule tab.
9. Click on the blue Request Disbursement link.

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Disbursement Schedule [Instructions](#) ?

Disbursement Schedule Number	Status	Year	Month	Projected Amount	Approved Amount	Disbursement Request
DS-00031220	Approved	2017	Nov	\$12,000.00	\$12,000.00	Request Disbursement

10. Complete the Requested Amount field (*this amount cannot exceed 50% of your originally submitted budget and should be 50% of actual expenses logged on the summary worksheet*), check the self-certification check box, and then hit the Request button.

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Date of Request 8/2/2017

Requested Amount *

☒ I certify to the best of my knowledge that the information submitted in my milestones and progress reports is true and correct.

[Request](#) [Cancel](#)

After your request is submitted, please click the Disbursement Request tab to view this request.

- This completes the MI-STEP reimbursement request process. Please note that complete processing and payment of your MI-STEP reimbursement request can take 20-25 days.
- For assistance with your MI-STEP reimbursement request submission, please contact Natalie Sandborn at sandbornn@michigan.org.