



Chapter 15: Action Plan Review Tools | Manage My Grants Module

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Chapter 15: Action Plan Review Tools

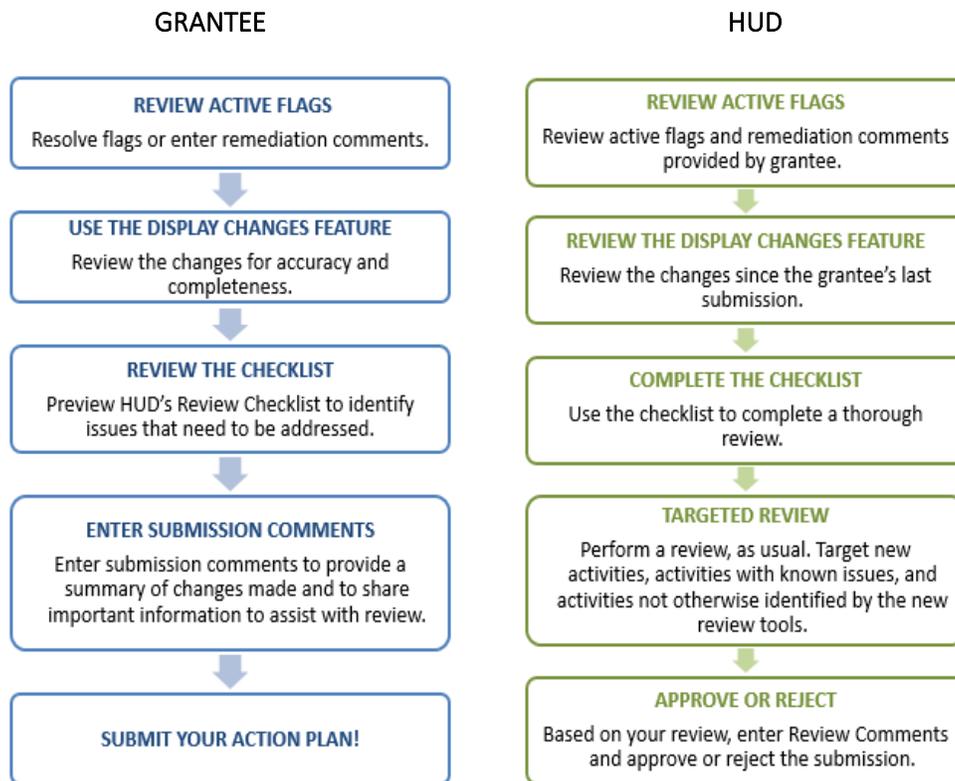
This Chapter provides guidance for accessing and using the Action Plan **“Review Tools”** page under the **Manage My Grants** module. The Action Plan **“Review Tools”** page helps Grantees and HUD Users to conduct Quality Assurance/Quality Control on Action Plans, particularly prior to Action Plan submission. Review Tools are accessible to all Grantee users.

Ideally Grantees will follow a workflow similar to the one below when submitting an Action Plan. This workflow makes active use of the **“Review Tools”** page to help improve Action Plan submission quality and clarity. Grantees will be using the **“Review Tools”** page to:

TIP! Remember that the data displayed on the **“Review Tools”** page is for the locked Grant.

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Display and review changes being submitted since the previously approved Action Plan
- Access and complete the Action Plan Checklist
- Review summary of Active Flags and helpful flag information

Grantee Action Plan Submission and HUD Review Workflow



After the Action Plan’s submission, HUD Reviewers review and either approve or reject the submitted Action Plan. HUD’s review will be specific to the Grant appropriation and will focus on the compliance of the Action Plan with Grant requirements and check for accuracy of information. This review will also be a means for the HUD Reviewer to understand how the Grant program is structured.



As part of this review, HUD Reviewers may use both the “Review Tools” page and, for some features, the main “Review Action Plan” page to access “Review Tools” features. HUD users will see the same functionality on their “Review Tools” page as Grantees see on their “Review Tools” page.

HUD Reviewers may utilize the following “Review Tools” features:

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Display and review changes being submitted since the previously approved Action Plan
- Access and complete the Action Plan Checklist
- Review summary of “Active Flags” and helpful flag information

Grantee and HUD users do not need Action Plan specific roles to access the Action Plan “Review Tools” page. The Action Plan Review Tools functions are summarized below:

Grantee Users

Feature	Subsection	Location
✘ Review Tools	B1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
✘ Review Tools	B2	Display Changes
✘ Review Tools	B3	Review Checklist
✘ Review Tools	B4	Review Active Flags

HUD Users

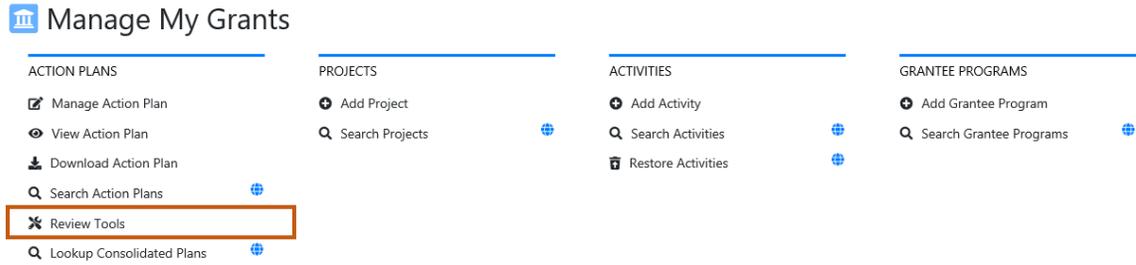
Feature	Subsection	Location
✘ Review Tools 👁 Review Action Plan	C1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
✘ Review Tools 👁 Review Action Plan	B2/C1	Display Changes
✘ Review Tools 👁 Review Action Plan	B3/C1	Review Checklist
✘ Review Tools 👁 Review Action Plan	B4/C1	Review Active Flags



A. Manage My Grants Module Access

The **Manage My Grants** module contains all Action Plan Review Tools actions.

A1. Grantee | User Access

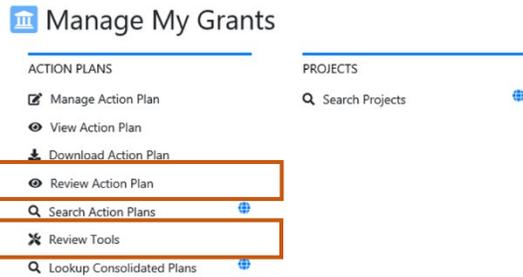
User Role: Grantee User	Menu Option:  Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan Review Tools.	
<p><input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants module:</p>	
<p>1 In the DRGR System, select the Manage My Grants module, or  icon, located in the navigation menu.</p> 	
<p>2 This opens the dropdown menu items for the Manage My Grants module. The System displays the relevant menu items based on user type and user roles.</p> 	

A2. HUD | User Access

User Role: HUD User	Menu Option:  Manage My Grants Module
Purpose: Allow HUD Users to access Action Plan Review and Review Tools.	
<p><input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants module:</p>	
<p>1 In the DRGR System, select the Manage My Grants module, or  icon, located in the navigation menu.</p> 	



- This opens the dropdown menu items for the **Manage My Grants** module. The System displays the relevant menu items based on user type and user roles.



B. Grantee and HUD Action Plan Review Tools

Below is a summary of the various features of the Action Plan **“Review Tools”** page and how to access them. As noted previously, Grantee and HUD users have access to the same Review Tools. Grantees will use them prior to an Action Plan submission to ensure quality, and HUD CPD Representatives will use them to review the Grantee’s Action Plan to facilitate their review and ensure compliance.

B1. Grantee and HUD | Summary of Action Plan Submission Comments / Review Comments

User Role: Grantee and HUD User	Menu Item: Review Tools
Purpose: Allow Users to review previously entered and saved Grantee Action Plan submission comments, HUD Review Comments, and HUD Supporting Documents.	
Complete the following steps to view the submission comments, review comments, and supporting documents:	
<ol style="list-style-type: none"> Navigate to the Manage My Grants module and locate the Action Plan menu. See Sections A1 and A2 above. Select the <Review Tools> link. The “Review Tools” page will load. <p style="text-align: center;">The remainder of this page intentionally left blank.</p>	



Action Plans

Review Tools

Grant Number:
B-18-DP-13-0001

Grantee Name:
Georgia

Grantee Submission Comments:
None

HUD Review Comments:
None

HUD Review Supporting Documents:
None

Display Changes
[Display changes from prior approved review](#)

Performance Benchmarks
None

Review Checklist
[Review Checklist](#)

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2 As described in Chapter 16 – Action Plan Submission and Approval, Grantees may submit comments to HUD along with their submission of the Action Plan. Any saved Grantee Action Plan submission comments will be displayed on the “**Review Tools**” page. HUD recommends including submission comments with each Action Plan submission, particularly in coordination with a review using the Display Changes feature described below. If the Submission Comments section displays “none,” then no Action Plan Submission Comments have been entered and saved since the previous Action Plan submission.

Grantee Submission Comments:
None

HUD Review Comments:
None

HUD Review Supporting Documents:
None

3 Similarly, HUD reviewers may provide comments and supporting documents in response to their review and approval or rejection of a Grantee’s submitted Action Plan. A summary of HUD’s comments and the supporting documents can be accessed from the <**Review Tools**> page.



<p>Grantee Submission Comments:</p> <p>None</p> <p>HUD Review Comments:</p> <p>None</p> <p>HUD Review Supporting Documents:</p> <p>None</p>
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B2. Grantee and HUD | Display Changes from Prior Approved Action Plan

Grantees are encouraged to use the Display Changes feature to review changes made since the previously approved Action Plan. This includes changes to text, performance measure projections, and budgets within the Action Plan’s project and activity edit screens. The information can be very useful in helping Grantees summarize the changes made in their Action Plan submission comments, particularly for larger Grantees where more than one person is making changes. Providing accurate and comprehensive Action Plan submission comments generally helps HUD CPD Representatives review Action Plan submissions more quickly. HUD Users will also use the Display Changes feature in their review of the submitted Action Plan.

User Role: Grantee and HUD User	Menu Item: Review Tools
Purpose: Display a record of changes made to the Action Plan through edits since the previous Action Plan approval.	
<input checked="" type="checkbox"/> Complete the following steps to view the Display Changes from Prior Approved Review page:	
<ol style="list-style-type: none"> 1 Navigate to the Manage My Grants module and locate the Action Plan menu. See Sections A1 and A2 above. Select the <Review Tools> link. The “Review Tools” page will load. 	
<p>The remainder of this page intentionally left blank.</p>	



Action Plans

Review Tools

Grant Number:
B-18-DP-13-0001

Grantee Name:
Georgia

Grantee Submission Comments:
None

HUD Review Comments:
None

HUD Review Supporting Documents:
None

Display Changes
[Display changes from prior approved review](#)

Performance Benchmarks
None

Review Checklist
[Review Checklist](#)

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

- 2 Select the <Display changes from prior approved review> link on the Action Plan “Review Tools” page. The “Display Changes” will load.

Display Changes

[Display changes from prior approved review](#)

Performance Benchmarks
None

- 3 The “Display Changes” page provides a side-by-side comparison of the current Action Plan to the previously approved Action Plan. Lines that contain changes are highlighted for easy identification. The top of the page also displays how many differences there are between the two versions and across how many lines.



Current		Prior	
- 1	Action Plan	1	Action Plan
2		2	
3	Grantee: New Jersey	3	Grantee: New Jersey
4		4	
5	Grant: B-08-DN-34-0001	5	Grant: B-08-DN-34-0001
6	Grant Award Amount: 51,470,620.00	6	Grant Award Amount: 51,470,620.00
7	LOCCS Grant Amount: 51,470,620.00	7	LOCCS Grant Amount: 51,470,620.00
- 8	Estimated PI: 1,242,779.93	8	Estimated PI: 1,241,779.93
- 9	Total Budget: 52,712,399.93	9	Total Budget: 52,712,399.93
10		10	

B3. Grantee and HUD | Action Plan Review Checklist

The Action Plan checklist allows Grantees and HUD to review Action Plans using a semi-automated checklist. The Action Plan Review checklist includes a series of questions, some of which will have System-calculated answers. This allows Grantees to identify some issues with the Action Plan submissions that would be highlighted by the HUD CPD Representative in its review. By using the checklist prior to submission, the Grantee is able to address concerns before they arise in HUD’s review.

User Role: Grantee and HUD User	Menu Item: Review Tools
Purpose: Allow Grantee and HUD User access to the Action Plan Checklist.	
<input checked="" type="checkbox"/> Complete the following steps to view the “Review Checklist” page:	
<ol style="list-style-type: none"> 1. Navigate to the Manage My Grants module and locate the Action Plan menu. See Sections A1 and A2 above. Select the <Review Tools> link. The “Review Tools” page will load. 	
<p>The remainder of this page intentionally left blank.</p>	



Action Plans

Review Tools

Grant Number:
B-18-DP-13-0001

Grantee Name:
Georgia

Grantee Submission Comments:
None

HUD Review Comments:
None

HUD Review Supporting Documents:
None

Display Changes
[Display changes from prior approved review](#)

Performance Benchmarks
None

Review Checklist
[Review Checklist](#)

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2. Select the **<Review Checklist>** link on the Action Plan **“Review Tools”** page. The **“Review Checklist”** page loads.





 — View Supporting Data	The “View Supporting Data” icon indicates questions that have been configured to display the supporting data associated with the question’s auto computed responses. On selection of this icon, the System will open a new window to display the supporting data.
 — Mandatory	The “Mandatory Questions” icon indicates questions that must be answered before submission.

B4. Grantee and HUD | Review Active Flags

User Role: Grantee and HUD User	Menu Item:  Review Tools												
Purpose: Allow Grantee and HUD Users to review summaries of Active Flags.													
<input checked="" type="checkbox"/> Complete the following steps to view the Active Action Plan Flags:													
<ol style="list-style-type: none"> Navigate to the Manage My Grants module and locate the Action Plan menu. See Sections A1 and A2 above. Select the <Review Tools> link. The “Review Tools” page will load. 													
<p>Action Plans</p> <p>Review Tools</p> <p>Grant Number: B-18-DP-13-0001</p> <p>Grantee Name: Georgia</p> <hr/> <p>Grantee Submission Comments: None</p> <p>HUD Review Comments: None</p> <p>HUD Review Supporting Documents: None</p> <hr/> <p>Display Changes Display changes from prior approved review</p> <hr/> <p>Performance Benchmarks None</p> <hr/> <p>Review Checklist Review Checklist</p> <hr/> <p>Flags</p> <p>Active Action Plan Flags:</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Flag Subcategory</th> <th>Flag Level</th> <th>Flag Type</th> <th>Flag Criteria</th> <th>Flag Status</th> <th>Flagged Since</th> </tr> </thead> <tbody> <tr> <td>AP STRUCTURE</td> <td>GRANT</td> <td>AT RISK</td> <td>OVERALL BENEFIT 75 PCT</td> <td></td> <td>08/02/2020</td> </tr> </tbody> </table>		Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since	AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020
Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since								
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020								



- The **“Review Tools”** page provides a summary of all **“Active Action Plan Flags”** and **“Active Project and Activity Flags.”** Summary/view only information is provided for each active flag. Detailed steps related to Grantees resolving and remediating of active flags and HUD’s comments on active flags are described in Chapter 32 – Compliance: Flags. Grantees should resolve or remediate flags prior to submitting the Action Plan.

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	COMPLIANCE	PLANNING CAP EXCEEDED DR		08/04/2019

Active Project and Activity Flags:

None

C. HUD Alternate Access to Review Tools

As described above, both Grantees and HUD CPD Representatives use the Review Tools features to assist in their role. Grantees use the tools to ensure a quality and compliant submission. HUD CPD Representatives use the tools to facilitate their review and ensure compliance. In addition to accessing the Review Tools features from the **“Review Tools”** page as described in Section B above, HUD CPD Representatives can access the Display Changes feature from the **“Action Plan Review”** page that loads after selecting the **<Review Action Plan>** link.

Note the difference between HUD’s use of the **“Action Plan Review”** page and the **“Review Tools”** page.

- The Review Screen is the page that loads after selecting the **<Review Action Plan>** link. On the **“Action Plan Review”** page HUD Users approve or reject the Action Plan and enter review comments.
- In contrast, the **“Review Tools”** page provides a summary of all Grantee and HUD user review actions.

C1. HUD | Access to Review Tools from the Review Action Plan Page

User Role: HUD User	Menu Item: Review Action Plan
Purpose: Allow HUD Users to access Review Tools from the “Review Action Plan” page.	
<input checked="" type="checkbox"/> Complete the following steps to access Review Tools from the “Review Action Plan” page:	
1 Navigate to the Manage My Grants module and locate the Action Plan menu. See Sections A1 and A2 above. Select the <Review Tools> link. The “Review Action Plan” page will load.	



- 2 The process for entering review comments and changing the status of the Action Plan are discussed in detail in Chapter 16 – Action Plan Submission and Approval. In addition to these functions, the “Review Action Plan” page includes direct access to certain Review Tools.

On the “Review Action Plan” page, the HUD CPD Representative will find:

- (a) a direct link to Display Changes;

Back to Previous Screen

Grant Number:
B-08-DN-22-0001

Grantee Name:
Louisiana

LOCCS Authorized Amount:
\$34,183,994.00

Grant Award Amount:
\$34,183,994.00

Estimated PI/RL Funds:
\$1,492,496.02

Total Budget:
\$35,676,490.00

Status:
Submitted - Await for Review

Save Review | Cancel Review Action Plan

Changes from Prior Review
Display changes from prior approved review

SUBMISSIONS COMMENTS

Action Plan Submission Comments
None

Action Plan Review Comments

- (b) the ability to search for active flags to provide comments; and

FLAGS
Search Activities For Adding Comments

Flagged Activities: Select OR Project Number: Grantee Activity Number: Review Comments: Select

Flag SubCategory: Select Flag Criteria: Select Flag Level: Select Flag Type: Select

Search Activity | Display All Flagged Items

5 Record(s) Displaying 1 through 5

Select	Project#	Activity#	Flag SubCategory	Flag Level	Flag Type	Flag Criteria	Flag Since	Comments	Review Comments	Last Updated
<input type="checkbox"/>	301	1	Capital City South RD-20 (NSRP)	DRAWDOWN	ACTIVITY AT RISK	ACTIVITY EXPENDITURES	09/26/2017	N	N	06/07/2020
<input type="checkbox"/>	301	2	Kentwood RD-21 (NSRD)	DRAWDOWN	ACTIVITY AT RISK	ACTIVITY EXPENDITURES	09/26/2017	N	N	06/07/2020
<input type="checkbox"/>	301	2	Rays of Sunshine RD-07 (NSRD)	DRAWDOWN	ACTIVITY AT RISK	ACTIVITY EXPENDITURES	09/26/2017	N	N	06/07/2020
<input type="checkbox"/>	301	4	Capital City South RD-20 (NSRD)	DRAWDOWN	ACTIVITY AT RISK	ACTIVITY EXPENDITURES	09/26/2017	N	N	06/07/2020
<input type="checkbox"/>	301	4	Kentwood RD-21 (NSRD)	DRAWDOWN	ACTIVITY AT RISK	ACTIVITY EXPENDITURES	09/26/2017	N	N	06/07/2020

Edit Activity Comments



(c) a summary of Checklist items to review with <Edit> links that direct the reviewer to the Checklist,

Review Checklist

- Areas of Greatest Need [Edit](#)
- Distribution and Use of Funds [Edit](#)
- Definitions and Descriptions [Edit](#)
- Housing Market Conditions [Edit](#)
- Information By Activity [Edit](#)
- Specific Activity Requirements [Edit](#)
- Low Income Targeting [Edit](#)
- Demolition or Conversion of Low- And Moderate-Income Units [Edit](#)
- Public Comment Period [Edit](#)
- Website Publication [Edit](#)
- SF424 [Edit](#)
- Certifications [Edit](#)
- Certifications for Entitlement Communities and States [Edit](#)
- Certifications for Non-Entitlements Communities [Edit](#)