



Chapter 16: Action Plan Submission and Approval | Manage My Grants Module

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Chapter 16: Action Plan Submission and Approval | Manage My Grants Module

This Chapter provides instruction for Grantee Users to submit Action Plans for HUD approval, using the **Manage My Grants** module. This Chapter also explains the process HUD Users use to review the Action Plan. These functions are not currently applicable to Grantee Users associated with a technical assistance provider in DRGR and HUD TA Users overseeing TA awards.

This Chapter describes actions for Grantee Users and HUD Users, and is divided into subsections. The following actions are covered in this Chapter:

Grantee Users

Menu Option	Subsection	Action
Manage Action Plan	B4	Submit Action Plan for review

HUD Users

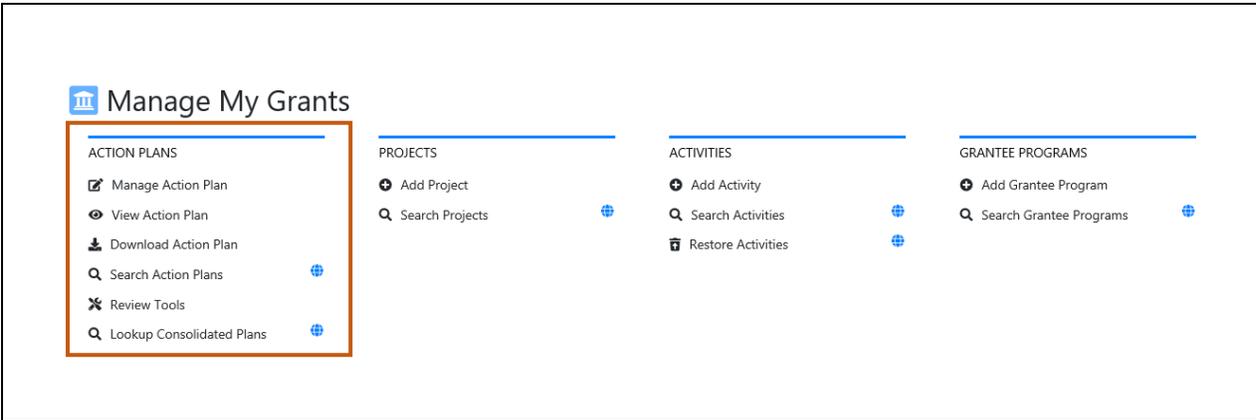
Menu Option	Subsection	Action
Review Action Plan	C1	Review Action Plan

A. Manage My Grants Module Access

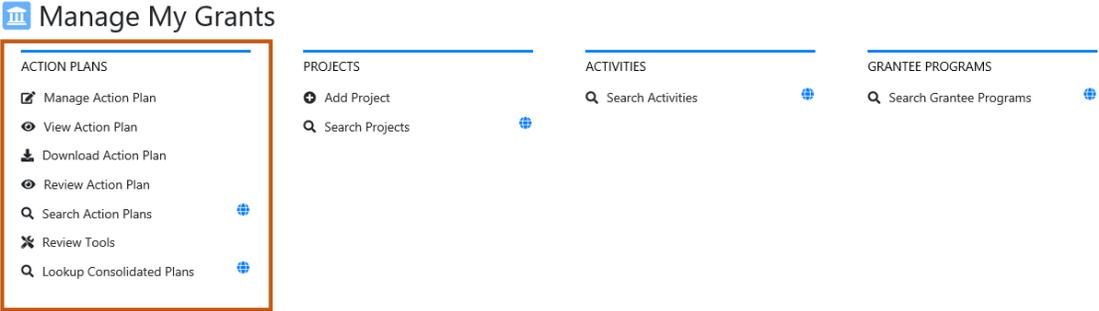
The **Manage My Grants** module contains access to Action Plan actions.

A1. Grantee | User Access

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



A2. HUD | User Access

User Role: HUD User	Menu Option: Manage My Grants Module
Purpose: Allow HUD Users to access Action Plan actions.	
<input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants Module:	
<p>1 In the DRGR System, click 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 DRGR System displays the relevant menu items based on user type and user roles. Functions available are displayed under each menu.</p> 	

B. Action Plan Submissions

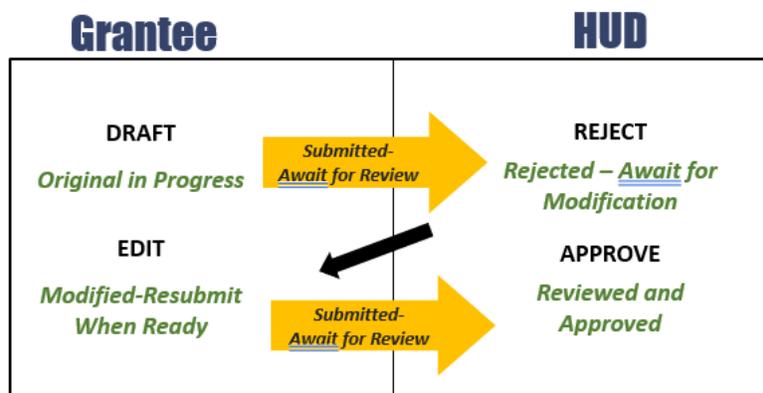
B1. Action Plan Status

The DRGR Action Plan is fluid and is expected to change often. Nearly all Grantees will, at some point, need to revisit the information in the action plan and make changes. (Reminder: Action Plans for Grants



associated with technical assistance provider organizations are established by HUD and do not require Grantee modifications.) It is important to understand that those changes, even if minor, will require resubmission of the action plan to HUD for review and approval. If a Grantee is making several changes to their action plan, they may wait until all of the changes are made and submit the action plan at once (instead of incrementally) to their HUD CPD Representative for review.

The figure below illustrates the flow of an action plan between a Grantee and HUD and the statuses the action plan will move between throughout the process. Action Plans start in ‘Original – In Progress’ status when they are added to the DRGR System. They will stay in this status until submitted when the status changes to ‘Submitted – Await for Review.’ At this point, HUD CPD Representatives will review the action plan and either approve the plan or reject the plan. If rejected, the action plan will be in a status of ‘Rejected – Await for Modification’ and will be available for Grantee edits. Once edited, status will change to ‘Modified – Resubmit when Ready’ until the plan is resubmitted by the Grantee. Once approved, an action plan will show a status of ‘Reviewed and Approved.’ Note that the action plan must be in ‘Reviewed and Approved’ status in order to submit the Performance Report. See Chapters 19 – 22 on Performance Reports for more information.



B2. Review Tools

Prior to submitting the Action Plan to HUD, Grantees are encouraged to use the Action Plan Review Tools to ensure a quality and compliant submission. Action Plan Review Tools allow a Grantee to check compliance with required elements of the action plan and review the plan’s content for accuracy and completeness and are the same tools that the Grantee’s HUD CPD Representative will use in conducting the Action Plan review. Using the tools in advance of the Action Plan submission can make for an easier and faster HUD review. The Review Tools allow Grantees and HUD to review compliance elements in the Action Plan checklist, display changes to the current version of the action plan as compared to the version approved previously, resolve, remediate, or comment on flags, and attach supporting documents. See Chapter 14 – Action Plan Review Tools for more information on how to use these helpful features.

B3. Troubleshooting

It is important to note applicable DRGR rules when attempting to submit an Action Plan for HUD review. If a user is unable to edit and/or submit the Action Plan, then it is likely because of one of the following common situations:

TIP! Review these rules if you are unable to submit the Action Plan.



- **An Action Plan cannot be submitted unless the Grantee User has the ‘Submit Action Plan’ role.** Only users with the ‘Submit Action Plan’ role can submit action plans. Grantee Users can, however, edit Action Plans, even without the ‘Submit Action Plan’ role. See Chapter 5 – User Management and Certification for instructions on adding additional user roles.
- **An Action Plan in a status of ‘Submitted – Await for Modification’ cannot be modified.** If a Grantee user has submitted the Action Plan, it cannot be edited until a HUD user has either rejected or approved the action plan. To resolve this issue, contact your HUD CPD representative.
- **An Action Plan for a Grant with a QPR in a status of ‘Submitted – Await for Modification’ cannot be submitted.** Performance Reports depend on data from the action plan. Although not recommended, Grantee users can ‘edit’ an action plan while a performance report is in ‘Submitted – Await for Modification’ status. However, an action plan cannot be ‘submitted’ until a HUD User that can view the Grant has either rejected or approved the performance report. To resolve this issue, contact your HUD CPD representative.
- **If an Action Plan cannot be edited it may be because (1) the Grantee is not active, (2) the Grant is not active, or (3) the user does not have edit capabilities.** Grantee DRGR accounts designated as ‘View Only’ cannot edit action plans or performance reports, however, Regular Grantee Users associated to a Grant can edit the action plan without additional roles. If a Grantee or Grant is not showing as active in DRGR, this may be a mistake by HUD’s DRGR System administrators. Contact your Grantee System administrator or DRGR_Help@hud.gov.

B4. Grantee | Submit Action Plan

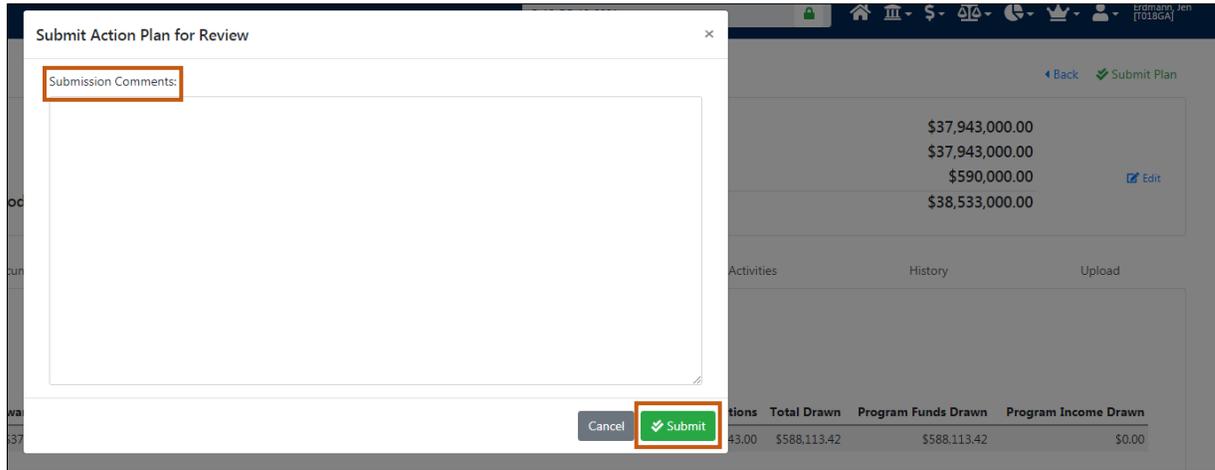
This action allows the Grantee to submit the Action Plan to HUD for review and approval.

User Role: Grantee User	Menu Option: Manage Action Plan																
Purpose: Allow Grantee Users to submit the DRGR Action Plan for HUD review.																	
<input checked="" type="checkbox"/> Complete the following steps to submit a DRGR Action Plan:																	
<ol style="list-style-type: none"> 1 After using the Review Tools outlined in Chapter 14 of the DRGR User Manual, navigate to the Manage My Grant or icon from the main navigation bar and select the <Manage Action Plan> link under the Action Plan menu. See Section A1 above. The “Manage Action Plan” page will load for the Grant selected in the locked Grant bar. Select <Submit Plan> in the upper right-hand corner of the page. <div data-bbox="240 1633 1386 1814" data-label="Image"> <p>The screenshot shows the 'Manage Action Plan' interface. At the top, there is a navigation bar with a 'Submit Plan' button highlighted in an orange box. Below the navigation bar, the page displays the following information:</p> <table border="1"> <tr> <td>Grant Number:</td> <td>TEST GRANT</td> <td>LOCCS Authorized Amount:</td> <td>\$0.00</td> </tr> <tr> <td>Grantee Name:</td> <td>Georgia</td> <td>Grant Award Amount:</td> <td>\$10,000,000,000,000.00</td> </tr> <tr> <td>Appropriation Code:</td> <td>2013 SDY</td> <td>Total Estimated PI/RL Funds:</td> <td>\$0.00</td> </tr> <tr> <td>Action Plan Status:</td> <td><input checked="" type="checkbox"/> Original - In Progress</td> <td>Total Budget:</td> <td>\$10,000,000,000,000.00</td> </tr> </table> <p>At the bottom of the page, there is a navigation menu with the following items: Financials, Narratives, Documents, Measures, Programs, Projects, Activities, History, and Upload.</p> </div> 2 After selecting <Submit Plan>, a page will load that allows Grantees to include submission comments. Note, it is recommended to include submission comments for the HUD CPD Representative regarding 		Grant Number:	TEST GRANT	LOCCS Authorized Amount:	\$0.00	Grantee Name:	Georgia	Grant Award Amount:	\$10,000,000,000,000.00	Appropriation Code:	2013 SDY	Total Estimated PI/RL Funds:	\$0.00	Action Plan Status:	<input checked="" type="checkbox"/> Original - In Progress	Total Budget:	\$10,000,000,000,000.00
Grant Number:	TEST GRANT	LOCCS Authorized Amount:	\$0.00														
Grantee Name:	Georgia	Grant Award Amount:	\$10,000,000,000,000.00														
Appropriation Code:	2013 SDY	Total Estimated PI/RL Funds:	\$0.00														
Action Plan Status:	<input checked="" type="checkbox"/> Original - In Progress	Total Budget:	\$10,000,000,000,000.00														

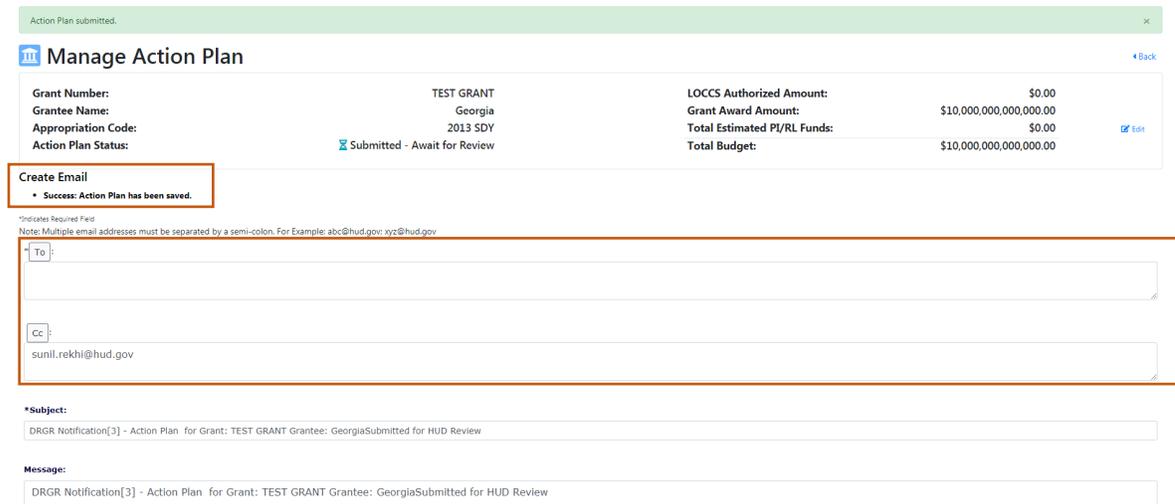


User Role: Grantee User Menu Option: Manage Action Plan

modifications and additions for which the Grantee is seeking HUD approval in the Action Plan. The comments will assist in HUD’s review. Once entered, submission comments appear on the “Review Tools” display for both HUD users and Grantee Users. After entering the submission comments, select **<Submit>**. The Action Plan is now submitted and will show the status of ‘Submitted – Await for Review’.



- After selecting **<Submit>** on the “Submit Action Plan for Review” page to submit the plan, DRGR will load a “Create Email” page to allow the Grantee user to notify the reviewer(s) that the Action Plan is ready for review. This page will also display a “Success: Action Plan has been saved” message. Select the **<To>** or **<Cc>** links to add additional recipients to the email.



- Selecting the **<To>** or **<Cc>** links to add additional recipients to the email takes the user to the “Email Search” page. On this page, users can search for additional recipients to add to the email. In lieu of being added to an email for notification of Action Plan submission, DRGR users can create a subscription to be notified



User Role: Grantee User **Menu Option:** Manage Action Plan

each time an Action Plan is submitted for review. See Chapter 7 – My Profile for information on managing subscriptions.

Action Plan submitted. x

Manage Action Plan ← Back

Grant Number:	TEST GRANT	LOCCS Authorized Amount:	\$0.00
Grantee Name:	Georgia	Grant Award Amount:	\$10,000,000,000,000.00
Appropriation Code:	2013 SDY	Total Estimated PI/RL Funds:	\$0.00 Edit
Action Plan Status:	Submitted - Await for Review	Total Budget:	\$10,000,000,000,000.00

ADMIN

Email Search

Search Criteria

HUD office: State/Territory: Grantee:

Last Name: First Name:

C. Action Plan Reviews

HUD users must review and approve or reject submitted Action Plans. HUD review will be specific to the Grant appropriation and will focus on the compliance of the Action Plan with Grant requirements and the accuracy and completeness of information. The review will also be a means for the HUD CPD Representative to understand how the Grant program is structured.

As part of this review, HUD users will utilize the “Review Tools” feature to access the Action Plan Checklist, display changes to the current version of the Action Plan, provide comments on active activities and flags, enter overall review comments, and attach supporting documents. Grantees should use Review Tools functions prior to submitting their Action Plans to ensure a smooth and efficient HUD review. Below is an illustration of how Grantee users and HUD users will use Review Tools to ensure compliance and quality. See Chapter 14 – Action Plan Review Tools for detailed information on using these functions.

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C1. HUD | Review Action Plan

This section explains the steps a HUD user will take to review an Action Plan submitted by a Grantee. Note that there is a difference between HUD’s use of the “Review Screen” and the “Review Tools.” The “**Action Plan Review**” page is where HUD users approve or reject the Action Plan and enter review comments. In contrast, “Review Tools” provide a summary of all Grantee and HUD user review actions.

User Role: HUD User	Menu Option: Review Action Plan
Purpose: Allow HUD Users to review and approve or reject the DRGR Action Plan.	
<input checked="" type="checkbox"/> Complete the following steps to review and approve or reject a DRGR Action Plan:	
<ol style="list-style-type: none"> 1 After using Review Tools outlined in Chapter 14 of the DRGR User Manual, navigate to the Manage My Grant or icon from the main navigation bar and select the <Review Action Plan> link under the Action Plan menu. See Section A2 above. The “View All Action Plans” page will load. Select the Grant number link for an Action Plan that has been submitted for review. 	



User Role: HUD User

Menu Option: Review Action Plan

ACTION PLANS
View All Action Plans

- Action plan cannot be reviewed unless in submitted status.

1 Page 2 >

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
GA	Georgia	B-96-DR-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Georgia	B-94-DA-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Albany, GA	B-94-MA-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Macon, GA	B-94-MA-13-0005	Close	Original - In Progress	Review Performance Reports
GA	Savannah, GA	B-94-MA-13-0006	Close	Original - In Progress	Review Performance Reports
GA	Warner Robins, GA	B-94-MA-13-0008	Close	Original - In Progress	Review Performance Reports
GA	Georgia	B-98-DD-13-0001	Close	Submitted - Await for Review	Review Performance Reports
GA	Georgia	B-08-DN-13-0001	Active	Modified - Resubmit When Ready	Review Performance Reports
GA	Gwinnett County, GA	B-08-UN-13-0005	Active	Reviewed and Approved	Review Performance Reports
GA	Savannah, GA	B-08-MN-13-0004	Active	Reviewed and Approved	Review Performance Reports

- 2 The "Review Action Plan" page loads. From this page the HUD user can easily:
 - a. Select the link to display changes from the previously reviewed and approved Action Plan;
 - b. Review submission comments from the Grantee; and
 - c. Add supporting documents to the review.

[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

ADD DOCUMENTS IN SUPPORT OF REVIEW

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf

None

[Add Additional Documents](#) | [Remove Selected Document](#)



- 3 After completing the review, the HUD user changes the status of the plan to “approved” or “rejected” using the status dropdown options. Select **<Save Review>** to save the changes. This action changes the status as selected and makes the Action Plan available for Grantee modifications.

Back to Previous Screen

Grant Number: B-08-DH-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

ADD DOCUMENTS IN SUPPORT OF REVIEW

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf

None

Add Additional Documents | Remove Selected Document