



Chapter 17: Technical Assistance Work Plans | Manage My Grants Module

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Chapter 17: Technical Assistance Work Plans

This Chapter provides instructions for Grantee Users associated with a technical assistance provider organization (TA Provider Users), to manage TA Work Plans in the DRGR System. TA Provider Users manage TA Work Plans within the **Manage My Grants** module. TA Work Plans populate as Activities on the related Action Plans in DRGR.

TIP: General Action Plan functions are covered in Chapters 10 – 18, which highlight applicability to users of TA Providers in the DRGR System. Review those chapters for overall Action Plan information.

This Chapter is divided into subsections. The following actions are covered in this Chapter:

Grantee Users

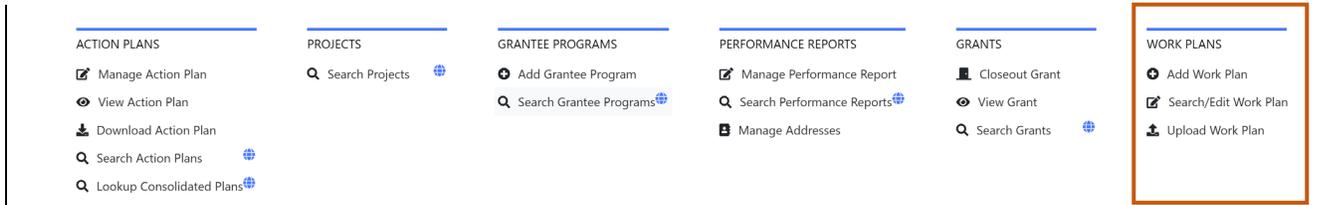
Menu Option	Subsection	Action
Add Work Plan	B1	Add TA Work Plan to Action Plan
Search/Edit Work Plan	C	Search for and Edit/Delete Work Plans
Upload Work Plan	D	Upload Work Plan information using data upload template

A. Manage My Grants Module Access

The Manage My Grants Module contains the TA Work Plan functions.

A1. Grantee | User Access

User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Manage My Grants Module
Purpose: Allow TA Provider Users to access Work 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 Work Plan functions under the Work Plan menu, as highlighted in the screenshot.	



B. Add Work Plans

TA Provider Users can add TA Work Plans in DRGR. The ability to add a Work Plan is not available to View Only users.

B1. Grantee | Add Work Plan

User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Add Work Plan
Purpose: Allow TA Provider Users to add a DRGR Work Plan.	
Complete the following steps to add a DRGR Work Plan:	
<p>1 Navigate to the Manage My Grants module or icon. Locate the Action Plan menu as described in Section A1 above. Select <Add Work Plan.>. The “Add TA Work Plan” page will load.</p>	
<p>2 On the “Add TA Work Plan” page, users will complete all fields. Fields marked with an asterisk are mandatory. The “Tips for Completing Data Fields In the Add Work Plan Function” table below provides instruction for completing these fields. When all information has been entered on this page, select <Save and Continue>.</p>	
The remainder of this page intentionally left blank.	



User Role: Grantee User (excluding non-TA Provider User)

Menu Option: Add Work Plan

TA
Add TA Work Plan
* Indicates required fields

Save Save and Continue Cancel

Originator: Wayne Freeman
Creation Date: 10/20/2020
TA Provider: Training And Development Associates

TA Work Plan

* Grant # Select Option * Work Plan Type Select Option Work Plan Category

* Work Plan # * Work Plan Status Open Work Plan Close Date Select Date (mm/dd/yyyy)

* Invoice Period Monthly # of Budget Amendments (Approved by HUD) 0 Submitted Date

Associated TA Requests:
Select TA Request Number / Status: Select Option
Add TA Request Remove Selected TA Request

Associated Work Plans:
Select TA Provider: Select Option Work Plan # / Status: Select Option
Add Work Plan Remove Selected Work Plan

* Scope

Organization Assisted:
Select Program State Grantee DUNS DUNS-EXT Sub-Grantee Sub-DUNS Sub-DUNS-EXT
Add Organization Remove Selected Organization

* Period of Performance:
From: To:
Select Date (mm/dd/yyyy) Select Date (mm/dd/yyyy)

Tasks:

Select	Task	Start Date	End Date	Estimated Cost	Estimated Hours	Narrative
<input type="checkbox"/>		<input type="text"/> <small>Select</small>	<input type="text"/> <small>Select</small>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
Total Budget (with Amendments)				\$ <input type="text"/>	<input type="text"/>	
Original Budget				\$ <input type="text"/>	<input type="text"/>	
Previously Approved Budget				\$ <input type="text"/>	<input type="text"/>	

Add Additional Tasks Remove Selected Tasks

Milestones:
Select Milestone: Expected Date: Select
Add Additional Milestones Remove Selected Milestones

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf
None
Add Additional Documents Remove Selected Document

Save Save and Continue Cancel

3 After selecting <Save and Continue>, on the “Add TA Work Plan” page, the “Manage TA Work Plan Activity” page is displayed. The “TA Work Plan Created Successfully” message appears at the top of the page.

The “Manage TA Work Plan Activity” page includes the “TA Work Plan Number” and “Work Plan Status” from page 1. The remaining information – under “TA Activities” – will populate after completing information under “Add Activity Details.”

Select the <Add Activity Details> button to navigate to the page 2 of the TA Work Plan – the “Add TA Activity” page. Or select <Return to TA Work Plan> to go back to page 1 of the TA Work Plan.

TIP: If the DRGR System displays errors, be sure that:

- all mandatory fields are complete; and
- sufficient funds are available to support the work plan budget.



User Role: Grantee User (excluding non-TA Provider User) **Menu Option:** Add Work Plan

TA
 • TA Work Plan Created Successfully

Manage TA Work Plan Activity

TA Work Plan Number: 4233554 **Work Plan Status:** Open

TA Activities:

Award #	Work Plan Type	Project #	Total Budget (with Amendments)	Original Budget	Previously Approved Budget	Action
<input type="button" value="Add Activity Details"/>						
<input type="button" value="Return to TA Work Plan"/>						

- On the “Add TA Activity” page, information from page 1 of the TA Work Plan populates at the top of page for “Award#,” “Work Plan Type,” “Projected Start Date,” “Projected End Date,” “Original Budget,” “Total Budget (with Amendments),” and “Previously Approved Budget.” These fields are grayed-out and cannot be edited on this screen.

TA
 Add TA Activity

TA Work Plan Number: 4233554 **Work Plan Status:** Open

Grant# :

Work Plan Type:

Projected Start Date: **Projected End Date:**

Original Budget: *** Project # / Project Title**

Total Budget (with Amendments): *** Proposed Staff Budget:**

Previously Approved Budget:

Proposed Staff Budget + Total Budget Line Item must <= Total Budget (with Amendments)

“Project #/Project Title” and the remaining information is completed by the TA Provider User.

The second page of the TA Work Plan requires TA Provider Users to associate the Work Plan to a project and segregate the costs that make up the total budget entered on page 1 of the TA work plan. Costs must be segregated by direct labor/staff costs, other direct costs (including travel), and indirect costs.

Guidance and tips on required information and how to complete these steps is provided in the “Tips for Completing Data Fields In the Add Work Plan Function” table below.

Enter information for all mandatory fields, and then select the **<Save and Return to TA Work Plan>** button.



User Role: Grantee User (excluding non-TA Provider User) **Menu Option:** Add Work Plan

Proposed Staff:
 Staff Type / Effective Date: Staff: From: To:

Other/BLI Costs:
 BLI: From: To: Description: Total:
 Total

Proposed Accomplishments:

Performance Measure	Proposed Total
# hours	

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf
 None
 |

5 Select <Return to TA Work Plan> to go back to page 1 of the TA Work Plan.

TA
• TA Work Plan Created Successfully

Manage TA Work Plan Activity

TA Work Plan Number: 4233554

Work Plan Status: Open

TA Activities:

Award #	Work Plan Type	Project #	Total Budget (with Amendments)	Original Budget	Previously Approved Budget	Action
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6 On page 1 of the <Add TA Work Plan> function, to submit the Work Plan for HUD review, select "Submitted" from the "Work Plan Status" field.

TA Work Plan

* Grant # * Work Plan Type Work Plan Category

* Work Plan # * Work Plan Status Work Plan Close Date
Select Date (mm/dd/yyyy)

* Invoice Period # of Budget Amendments (Approved by HUD) Submitted Date

When the Work Plan Status is changed to "Submitted," the System sends an email to the CPD Rep and the Work Plan creator.



Tips for Completing Data Fields In the Add Work Plan Function

Page	Field	Tip																																																												
Add TA Work Plan – Page 1	Originator	The System displays the name of the TA Provider user who created the Work Plan.																																																												
Add TA Work Plan – Page 1	Creation Date	The System displays the date the Work Plan was created.																																																												
Add TA Work Plan – Page 1	TA Provider	The TA Provider is named on the TA Work Plan. Each Work Plan is associated with a single TA Provider organization. This organization is responsible for carrying out the TA Work Plan/Activity.																																																												
Add TA Work Plan – Page 1	Award #	<p>Select the Grant number from the “Award #” dropdown menu.</p> <p>If the Grant number is not listed in the dropdown, the user may not be associated with the missing Grant. See Chapter 5 – User Management and Certification for steps on associating users to Grants.</p> <p>NOTE: TA Providers must be sure to use older funds for work plans, provided the award documents allow for the work plan scope.</p>																																																												
Add TA Work Plan – Page 1	Work Plan Type	<p>Select the Work Plan type from the “Work Plan Type” dropdown menu. The Work Plan Type dropdown is dependent on the Award # selected.</p> <p>NOTE: The Work Plan Type list is more extensive in DRGR than the list in the TA Portal. Select the most appropriate type and category in each system.</p> <table border="1"> <thead> <tr> <th>Work Plan/Activity Type</th> <th>Work Plan/Activity Category</th> </tr> </thead> <tbody> <tr><td>Administration</td><td>Admin</td></tr> <tr><td>TA - AAQ</td><td>TA - Tech Asst</td></tr> <tr><td>TA - Embedded Support</td><td>TA - Tech Asst</td></tr> <tr><td>TA - Needs Assessment</td><td>TA - Tech Asst</td></tr> <tr><td>TA - On Call Assistance</td><td>TA - Tech Asst</td></tr> <tr><td>TA -Direct TA (practitioner support)</td><td>TA - Tech Asst</td></tr> <tr><td>TA Coordination</td><td>TA - Coord</td></tr> <tr><td>TA Data Analysis/Reporting</td><td>TA - Data Rept & Mngmt</td></tr> <tr><td>TA Delivering Workshops</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Developing Web Products</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Developing Workshop Materials</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Guidebooks/written products</td><td>TA - Written</td></tr> <tr><td>TA HMIS Data Lab</td><td>TA - Data Rept & Mngmt</td></tr> <tr><td>TA Knowledge Mngmt</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Lead TA Coordinator</td><td>TA - Coord</td></tr> <tr><td>TA NSP Website</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Other Data Rept & Mngmt</td><td>TA - Data Rept & Mngmt</td></tr> <tr><td>TA Other Direct TA</td><td>TA - Tech Asst</td></tr> <tr><td>TA Other Web TA</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Other Workshops</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Other Written Products</td><td>TA - Written</td></tr> <tr><td>TA peer-to-peer / innovative learning</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Problem Solving Clinics</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Sample forms/tools/procedures</td><td>TA - Written</td></tr> <tr><td>TA Train the Trainers Session</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Web Technology and Support</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Web-based learning/webinars</td><td>TA - Web/Knowledge Mngmt</td></tr> <tr><td>TA Workshops</td><td>TA - Wkshp/Clinic</td></tr> <tr><td>TA Written Products</td><td>TA - Written</td></tr> </tbody> </table>	Work Plan/Activity Type	Work Plan/Activity Category	Administration	Admin	TA - AAQ	TA - Tech Asst	TA - Embedded Support	TA - Tech Asst	TA - Needs Assessment	TA - Tech Asst	TA - On Call Assistance	TA - Tech Asst	TA -Direct TA (practitioner support)	TA - Tech Asst	TA Coordination	TA - Coord	TA Data Analysis/Reporting	TA - Data Rept & Mngmt	TA Delivering Workshops	TA - Wkshp/Clinic	TA Developing Web Products	TA - Web/Knowledge Mngmt	TA Developing Workshop Materials	TA - Wkshp/Clinic	TA Guidebooks/written products	TA - Written	TA HMIS Data Lab	TA - Data Rept & Mngmt	TA Knowledge Mngmt	TA - Web/Knowledge Mngmt	TA Lead TA Coordinator	TA - Coord	TA NSP Website	TA - Web/Knowledge Mngmt	TA Other Data Rept & Mngmt	TA - Data Rept & Mngmt	TA Other Direct TA	TA - Tech Asst	TA Other Web TA	TA - Web/Knowledge Mngmt	TA Other Workshops	TA - Wkshp/Clinic	TA Other Written Products	TA - Written	TA peer-to-peer / innovative learning	TA - Wkshp/Clinic	TA Problem Solving Clinics	TA - Wkshp/Clinic	TA Sample forms/tools/procedures	TA - Written	TA Train the Trainers Session	TA - Wkshp/Clinic	TA Web Technology and Support	TA - Web/Knowledge Mngmt	TA Web-based learning/webinars	TA - Web/Knowledge Mngmt	TA Workshops	TA - Wkshp/Clinic	TA Written Products	TA - Written
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Add TA Work Plan – Page 1	Work Plan Category	<p>The “Work Plan Category” is populated based on the selected Work Plan type.</p> <p>NOTE: The work plan category in DRGR should reflect the appropriate option, based on the NOFA eligible activities compared to the work plan scope.</p>																																																												



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Add TA Work Plan – Page 1	Work Plan #	Enter a work plan in the “Work Plan #” field. This entry must comply with the TA program schema for Work Plan numbers.														
Add TA Work Plan – Page 1	Work Plan Status	<p>The “Work Plan Status” defaults to ‘Open’. TA Providers can change the status to “Submitted,” “Cancelled,” or “Close.” HUD controls the “Approved” and “Rejected” status options.</p> <table border="1"> <tr> <td>Open</td> <td>The default status for all Work Plans not yet submitted.</td> </tr> <tr> <td>Submitted</td> <td>The status used by TA Providers to submit a Work Plan for HUD review. Work Plans can be submitted when all mandatory Work Plan fields are completed, on both pages of the Work Plan in DRGR.</td> </tr> <tr> <td>Approved</td> <td>The status used by HUD to indicate Work Plan approval. HUD may approve Work Plans with or without comments.</td> </tr> <tr> <td>Rejected</td> <td>The status used by HUD to indicate Work Plan disapproval. HUD may reject Work Plans with or without comments.</td> </tr> <tr> <td>Modified</td> <td>Approved work plans that are subsequently changed by TA Providers may have this status. TA Providers must re-submit to HUD all Work Plans with this status.</td> </tr> <tr> <td>Cancelled</td> <td>The status available for Work Plans that will not be used and have no funds draws.</td> </tr> <tr> <td>Closed</td> <td>The status used by TA Providers to mark work plans as complete.</td> </tr> </table>	Open	The default status for all Work Plans not yet submitted.	Submitted	The status used by TA Providers to submit a Work Plan for HUD review. Work Plans can be submitted when all mandatory Work Plan fields are completed, on both pages of the Work Plan in DRGR.	Approved	The status used by HUD to indicate Work Plan approval. HUD may approve Work Plans with or without comments.	Rejected	The status used by HUD to indicate Work Plan disapproval. HUD may reject Work Plans with or without comments.	Modified	Approved work plans that are subsequently changed by TA Providers may have this status. TA Providers must re-submit to HUD all Work Plans with this status.	Cancelled	The status available for Work Plans that will not be used and have no funds draws.	Closed	The status used by TA Providers to mark work plans as complete.
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Closed	The status used by TA Providers to mark work plans as complete.															
Add TA Work Plan – Page 1	Work Plan Close Date	After the work is completed and the TA Provider is ready to close out the Work Plan, enter a close date (mm/dd/yyyy) or choose <Select> and select a date.														
Add TA Work Plan – Page 1	Invoice Period	DRGR defaults to “Monthly,” which is the only available option.														
Add TA Work Plan – Page 1	# of Budget Amendments (Approved by HUD)	DRGR automatically tracks and displays the number of HUD approvals on a Work Plan.														
Add TA Work Plan – Page 1	Associated TA Requests	If available, users can associate one or more TA requests to a work plan.														
Add TA Work Plan – Page 1	Associated Work Plans	If the TA Work Plan is associated with any other Work Plans in DRGR, TA Providers can associate the new Work Plan with one already in the System. Select the TA Provider first and then the Work plan number.														



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Add TA Work Plan – Page 1	Scope	<p>Enter a brief scope for the Work Plan (limit 4000 characters). The Scope must comply with HUD award requirements. Entering only “See TA Portal” is not appropriate.</p> <p>Use the options under the Scope field, to format, undo, or re-do text.</p>												
Add TA Work Plan – Page 1	Organizations Assisted	<p>Add organizations by program for which TA is provided. If multiple organizations with the same name are listed in the System, then be sure to add the Grantee with the correct DUNS. Check with the Grantee or HUD to determine the correct DUNS.</p> <p>All Grantees may not be listed in the System. If a Grantee is not listed, leave this section blank temporarily. Other organizations will be added soon.</p> <p>Use the <Add Organization> link to add assisted Grantees to the Work Plan. In the “Organization Search” box that opens, enter search criteria and select <Search>. Choose the radio button next to the desired organization and <Select Organization> to add it to the Work Plan.</p> <div data-bbox="787 909 1523 1087" style="border: 1px solid black; padding: 5px;"> <p>TA WORKPLAN Organization Search</p> <p>Search Criteria</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Field Office</td> <td style="width: 33%;">Region</td> <td style="width: 33%;">Program</td> </tr> <tr> <td><input type="text" value="Select Option"/></td> <td><input type="text" value="Select Option"/></td> <td><input type="text" value="Select Option"/></td> </tr> <tr> <td>State</td> <td>Grantee</td> <td>DUNS</td> </tr> <tr> <td><input type="text" value="Select Option"/></td> <td><input type="text" value="Select Option"/></td> <td><input type="text" value="Select Option"/></td> </tr> </table> <p><input type="checkbox"/> Display Sub-Grantees</p> <p style="text-align: center;"><input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/></p> </div>	Field Office	Region	Program	<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>	State	Grantee	DUNS	<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>
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State	Grantee	DUNS												
<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>												
Add TA Work Plan – Page 1	Period of Performance	<p>From and To fields: enter the start date of the work plan in the “From” field. And, in the “To” field, enter the end date for the work (including project management) to be completed. The start and end date must comply with HUD award requirements. In general, the start date should reflect the date the assignment was made by HUD to the TA Provider, to allow for billable project management activities. When entering an end date, TA Providers should anticipate the need to capture trailing costs as well as final reporting.</p>												
Add TA Work Plan – Page 1	Task	<p>Enter a descriptive name for the first task on the work plan. In general, the first task on a work plan should be the Project Management task. This includes the activities related to designing, coordinating, and administering the award requirements for the work plan.</p> <p>Select <Add Additional Task> to add more tasks to the work plan. Or to remove tasks, click one or more checkboxes under the “Select” column for Tasks, and then select the <Remove Selected Tasks> button.</p>												
Add TA Work Plan – Page 1	(Task) Start Date and End Date	<p>Enter the start and end dates (mm/dd/yyyy) for the Task. Or select the <Select Date> link to select a date. The start and end dates must be within the TA work plan period of performance.</p>												



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Add TA Work Plan – Page 1	(Task) Estimated Cost	Enter the total cost associated with the Task. This must include direct and indirect costs, and any travel costs. Note: The TA work plan budget is based on the sum of Estimated Costs for each Task. The DRGR System will maintain data integrity to ensure that the Grant funds obligated to this TA work plan is equal to the total work plan budget.
Add TA Work Plan – Page 1	(Task) Estimated Hours	Enter the total hours associated with the Task.
Add TA Work Plan – Page 1	(Task) Narrative	Enter a description of the Task, including work to be completed, travel, staff, and estimated hours by staff.
Add TA Work Plan – Page 1	Milestone	Enter the milestone description.
Add TA Work Plan – Page 1	(Milestone) Expected Date	Enter milestone completion date (mm/dd/yyyy), or choose the <Select> link and select a date.
Add TA Work Plan – Page 1	Supporting Document	Use the <Add Additional Documents> link to attach files to support the information on this page of the work plan. Use a valid file format, as shown on the screen. Select <Browse> . In the window that opens, locate the file to add to the work plan. The file address will appear on the work plan. To remove a file, select the checkbox under the “Select” header, and then choose the <Remove Selected Document> link. Select <Save> to save information on page 1 of the work plan, and remain on the page. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf</p> <p>None</p> <p>Add Additional Documents Remove Selected Document</p> </div>
Add TA Activity – Page 2	Total Budget (with Amendment)	This field is displayed in read only format and is the sum of the Estimated Cost for each task.
Add TA Activity – Page 2	Original Budget	Initially, this field is displayed in read only format the sum of the Estimated Cost for each task. As amendments and modifications are completed, this field stores the original budget approved by HUD. NOTE: The amount in this field is used to calculate the 10% budget change threshold.
Add TA Activity – Page 2	Previous Approved Budget	Initially, this field displays no data. As amendments and modifications are completed, this field stores the previous budget approved by HUD.
Add TA Activity – Page 2	Project	Select the appropriate project from the “Project #/Project Title” dropdown menu. The dropdown options are based on the Projects setup in the DRGR System by HUD.



Add TA Activity – Page 2	Proposed Staff Budget	<p>The Proposed Staff Budget field is initially blank but populates with the sum of the staff costs, after staff are added to the work plan. This field is not editable.</p> <div style="background-color: #1a3d54; color: white; padding: 10px; border-radius: 15px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">Tips on Proposed Staff Budget</p> <p>The following financial constraints apply to the Proposed Staff Budget:</p> <ul style="list-style-type: none"> • Proposed Staff Budget <= Total Budget • Proposed Staff Budget >= Sum of all Total Costs of Proposed Staff • Proposed Staff Budget + Sum of Other Costs <= Total Budget <p>Only a user with the Staff Rate role will have the ability to view rates and complete this section of the Work Plan. All Work Plans must list at least one person in this section. HUD approval of all rates is needed for before the TA Provider can bill for persons on the Work Plan.</p> <p>The TA Work Plan must list both key and non-key personnel. TA Providers can change Staff Types or Staff without requiring re-approval of the Work Plan in DRGR; however, all changes must be noted with a date in the Scope field.</p> </div>
Add TA Activity – Page 2	Staff Type/Effective	<p>Select the “Staff Type/Effective Date” from the dropdown menu. This list includes the staff rate types with the effective date, as submitted to HUD for approval. Inactive staff rate types are not included in the listed. Rates pending HUD approval are marked with a yellow icon.</p> <p>Select <Add Additional Staff>, to add multiple Staff Types or Staff.</p>
Add TA Activity – Page 2	Staff	<p>Select the Staff from the dropdown menu.</p> <p>Select <Add Additional Staff>, to add multiple Staff Types or Staff.</p>
Add TA Activity – Page 2	From / To	<p>Enter the start date in the “From” field and the end date in the “To” field for the selected staff person. These dates must reflect the estimated start and end dates for the staff and must be within the performance period for the TA Work Plan.</p>
Add TA Activity – Page 2	Hours	<p>In the Hours field, enter the hours associated with the staff.</p>
Add TA Activity – Page 2	Rate	<p>The Rate field is populated based on selected “Staff Rate/Effective Date.”</p>
Add TA Activity – Page 2	Total	<p>The Total fields are calculated based on the rates and hours.</p>



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Add TA Activity – Page 2	BLI	<p>The “Other/BLI Costs” section of the TA Work Plan must list the direct/non-labor costs and indirect costs. Also, overpayments from other work plans that were not returned to DRGR should be added to this page of the Work Plan.</p> <p>Select a budget link item (BLI) from the “BLI” dropdown menu. The menu includes the following options:</p> <ul style="list-style-type: none"> • Travel: This option is available to note all travel costs associated with the Work Plan. Multiple “Travel” line can be included in the Work Plan. • Other: This option is available note all other costs associated with the Work Plan. Multiple “Other” line can be included in the Work Plan. • Revised Fund: Use this option to note expected indirect cost rate adjust payments from HUD or to note overpayments from other work plans that will be used on this Work Plan. <p>Select <Add Additional Cost> to add multiple BLIs.</p> <p>To remove BLIs, click the checkbox next to the item to be removed and select <Remove Selected Cost>.</p>
Add TA Activity – Page 2	(BLI) To / From	Enter a start date (mm/dd/yyyy) in the “From” field and an end date (mm/dd/yyyy) in the “To” field. Or use the <Select> link to add start and end dates. These dates must occur within the Work Plan performance period.
Add TA Activity – Page 2	(BLI) Description	Enter a description of the line item costs, in the BLI “Description” field.
Add TA Activity – Page 2	(BLI) Total	Enter the total cost for the line item, in the “Total” field. The total amount for all BLIs are summed at the bottom of the BLI list, in “Total” field that is grayed-out.
Add TA Activity – Page 2	Proposed Accomplishments	Enter the proposed accomplishment based on HUD direction. These accomplishments populate as measures on the Action Plan in DRGR.
Add TA Activity – Page 2	Supporting Document	<p>Select <Add Additional Documents> to attach files to support the information on this page of the work plan. Use a valid file format, as shown on the screen.</p> <p>Select <Browse>. In the window that opens, locate the file to add to the work plan. The file address will appear on the work plan.</p> <p>To remove a file, select the checkbox under the “Select” header, and then choose <Remove Selected Document>.</p> <p>Select <Save> to save information on page 1 of the work plan, and remain on the page.</p> <div data-bbox="781 1724 1471 1801" style="border: 1px solid black; padding: 5px;"> <p>Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf</p> <p>None</p> <p>Add Additional Documents Remove Selected Document</p> </div>



C. Search, Edit, or Delete Work Plans

After a Work Plan is created, TA Provider Users may search for Work Plans and edit or delete them as needed. TA Provider Users can edit the fields that were populated during the process of creating the work plan, however, only TA Provider Users with the Staff Rate role can see staff rates on a TA Work Plan., Other TA Provider Users cannot. For more information on user roles, see Chapter 5 – User Management and Certifications.

When editing a TA Work Plan, the Work Plan status will change to “Modified.” TA Provider Users must change the status to “Submitted,” so that the Work Plan can be re-approved by HUD. TA Providers can also upload Work Plan edits (see Chapter 34 – Data Uploads for more information).

C1. Grantee | Search for Work Plans

User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Search/Edit Work Plan																												
Purpose: Allow TA Provider Users to search for a DRGR Work Plan.																													
Complete the following steps to search for a DRGR Work Plan:																													
<p>1 Navigate to the Manage My Grants module or icon. Locate the Action Plan menu as described in Section A1 above. Select <Search/Edit Work Plan.> The “TA Work Plan Search” page will load.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">ACTION PLANS</td> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">PROJECTS</td> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">GRANTEE PROGRAMS</td> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">PERFORMANCE REPORTS</td> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">GRANTS</td> <td style="width: 16.6%; border-bottom: 1px solid #ccc; padding: 2px;">WORK PLANS</td> </tr> <tr> <td style="padding: 2px;"> Manage Action Plan</td> <td style="padding: 2px;"> Search Projects </td> <td style="padding: 2px;"> Add Grantee Program</td> <td style="padding: 2px;"> Manage Performance Report</td> <td style="padding: 2px;"> Closeout Grant</td> <td style="padding: 2px;"> Add Work Plan</td> </tr> <tr> <td style="padding: 2px;"> View Action Plan</td> <td style="padding: 2px;"> Search Action Plans </td> <td style="padding: 2px;"> Search Grantee Programs </td> <td style="padding: 2px;"> Search Performance Reports </td> <td style="padding: 2px;"> View Grant</td> <td style="padding: 2px;"> Search/Edit Work Plan</td> </tr> <tr> <td style="padding: 2px;"> Download Action Plan</td> <td style="padding: 2px;"> Lookup Consolidated Plans </td> <td style="padding: 2px;"></td> <td style="padding: 2px;"> Manage Addresses</td> <td style="padding: 2px;"> Search Grants </td> <td style="padding: 2px;"> Upload Work Plan</td> </tr> </table> </div>		ACTION PLANS	PROJECTS	GRANTEE PROGRAMS	PERFORMANCE REPORTS	GRANTS	WORK PLANS	Manage Action Plan	Search Projects	Add Grantee Program	Manage Performance Report	Closeout Grant	Add Work Plan	View Action Plan	Search Action Plans	Search Grantee Programs	Search Performance Reports	View Grant	Search/Edit Work Plan	Download Action Plan	Lookup Consolidated Plans		Manage Addresses	Search Grants	Upload Work Plan				
ACTION PLANS	PROJECTS	GRANTEE PROGRAMS	PERFORMANCE REPORTS	GRANTS	WORK PLANS																								
Manage Action Plan	Search Projects	Add Grantee Program	Manage Performance Report	Closeout Grant	Add Work Plan																								
View Action Plan	Search Action Plans	Search Grantee Programs	Search Performance Reports	View Grant	Search/Edit Work Plan																								
Download Action Plan	Lookup Consolidated Plans		Manage Addresses	Search Grants	Upload Work Plan																								
<p>2 On the “TA Work Plan Search” page, use the “Search Criteria” to find one or more TA Work Plans. Alternatively, users can select <TA Work Plan Search> without entering any data into the search fields to see a list of all Work Plans. The search results are displayed on the same screen.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>TA TA Work Plan Search</p> <p>Search</p> <p>Search Criteria</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Work Plan Number:</td> <td style="width: 25%;">Work Plan Type:</td> <td style="width: 25%;">Work Plan Status:</td> <td style="width: 25%;">TA Request #:</td> </tr> <tr> <td><input type="text"/></td> <td>Select Option </td> <td>Select Option </td> <td><input type="text"/></td> </tr> <tr> <td>TA Provider:</td> <td>Grantee Assisted:</td> <td>Organization Assisted:</td> <td>Award#:</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Period of Performance From:</td> <td colspan="3">Period of Performance To:</td> </tr> <tr> <td><input type="text"/></td> <td colspan="3"><input type="text"/></td> </tr> <tr> <td><small>Select(mm/dd/yyyy)</small></td> <td colspan="3"><small>Select(mm/dd/yyyy)</small></td> </tr> </table> <p> </p> </div>		Work Plan Number:	Work Plan Type:	Work Plan Status:	TA Request #:	<input type="text"/>	Select Option	Select Option	<input type="text"/>	TA Provider:	Grantee Assisted:	Organization Assisted:	Award#:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Period of Performance From:	Period of Performance To:			<input type="text"/>	<input type="text"/>			<small>Select(mm/dd/yyyy)</small>	<small>Select(mm/dd/yyyy)</small>		
Work Plan Number:	Work Plan Type:	Work Plan Status:	TA Request #:																										
<input type="text"/>	Select Option	Select Option	<input type="text"/>																										
TA Provider:	Grantee Assisted:	Organization Assisted:	Award#:																										
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																										
Period of Performance From:	Period of Performance To:																												
<input type="text"/>	<input type="text"/>																												
<small>Select(mm/dd/yyyy)</small>	<small>Select(mm/dd/yyyy)</small>																												
<p>3 The results display key features of the TA Work Plan: “Workplan#,” “TA Provider,” “Performance Period,” “Creation Date,” “Last Update Date,” “Date Submitted,” “Status,” “Drawdown Blocked,” and allowable functions based on the user role in the “Actions” column.</p> <p>Select each column within the search results to sort the list in descending and ascending order.</p>																													



User Role: Grantee User (excluding non-TA Provider User)

Menu Option: Search/Edit Work Plan

Select **<Search Again>** to search for additional TA Work Plans.

TA
TA Work Plan Search

433 Record(s) Displaying 1 through 10

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown Blocked	Action
	04/17/2012	04/17/2021	07/29/2013	04/06/2020	03/05/2020	Approved					Edit Notes PDF Comments
	11/01/2015	09/23/2020	11/03/2015	03/20/2020	08/14/2019	Approved					Edit Notes PDF Comments
	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	07/01/2019	12/31/2020	08/07/2019	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	07/01/2016	04/17/2021	07/19/2016	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	02/28/2020	09/30/2020	03/05/2020	03/17/2020	03/05/2020	Approved					Edit Notes Delete PDF Comments
	06/20/2012	04/17/2021	07/29/2013	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	04/17/2012	04/17/2021	07/29/2013	03/17/2020	03/05/2020	Approved					Edit Notes PDF Comments
	06/01/2018	07/31/2019	06/04/2018	03/06/2020		Closed					Edit Notes PDF Comments

[Search Again](#)

4 To view the TA Work Plan, select the **<Work Plan#>** hyperlink in the "Work Plan #" column for the desired Work Plan.

To view notes associated with the Work Plan, select **<Notes>** in the "Action" column for the desired Work Plan.

To view comments entered by HUD for a specific Work Plan, select **<Comments>** in the "Action" column of the desired Work Plan.

To view download a PDF of a Work Plan, select **<PDF>** under the "Action" column.

TA
TA Work Plan Search

433 Record(s) Displaying 1 through 10

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown Blocked	Action
	04/17/2012	04/17/2021	07/29/2013	04/06/2020	03/05/2020	Approved					Edit Notes PDF Comments
	11/01/2015	09/23/2020	11/03/2015	03/20/2020	08/14/2019	Approved					Edit Notes PDF Comments
	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	07/01/2019	12/31/2020	08/07/2019	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	07/01/2016	04/17/2021	07/19/2016	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	02/28/2020	09/30/2020	03/05/2020	03/17/2020	03/05/2020	Approved					Edit Notes Delete PDF Comments
	06/20/2012	04/17/2021	07/29/2013	03/17/2020	03/11/2020	Approved					Edit Notes PDF Comments
	04/17/2012	04/17/2021	07/29/2013	03/17/2020	03/05/2020	Approved					Edit Notes PDF Comments
	06/01/2018	07/31/2019	06/04/2018	03/06/2020		Closed					Edit Notes PDF Comments

[Search Again](#)

The remainder of this page intentionally left blank.



C2. Grantee | Edit Work Plans

User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Search/Edit Work Plan
Purpose: Allow TA Provider Users to edit a DRGR Work Plan.	
Complete the following steps to edit a DRGR Work Plan:	
<p>1 Follow the steps in Section C1 to search for a Work Plan. Select the <Edit> in the “Action” column of the Work Plan to be edited. The “Edit TA Work Plan” page loads.</p>	
<p>2 On the “Edit TA Work Plan” page, TA Provider Users see the same fields that were populated during the add work plan process (see section B above). Edit available fields as appropriate and select <Save and Continue> to save changes and load the “Manage TA Work Plan Activity” page.</p>	<p>PROGRAM PROCESS RECOMMENDATION: Users may need to reassign an activity to a new project. This may occur if a TA Provider selected the wrong Project on the TA Work Plan and the CPD Representative approved the error. To move/reassign a TA Work Plan to a different project, email the assigned CPD Representative.</p>
<p>3 On the “Manage TA Work Plan Activity” page, select <Edit> on any Activity that needs to be edited to load the “Edit TA Activity” page.</p>	



User Role: Grantee User (excluding non-TA Provider User)

Menu Option: Search/Edit Work Plan

TA
• TA Work Plan Updated Successfully
Manage TA Work Plan Activity

TA Work Plan Number: TDA-T-12-039-04

Work Plan Status: Approved

TA Activities:

Award #	Work Plan Type	Project #	Total Budget (with Amendments)	Original Budget	Previously Approved Budget	Action
T-12-NN-37-0024	TA - On Call Assistance	NSP12	\$139,328.96	\$55,691.35	\$92,116.74	Edit View

[Add Activity Details](#)

[Return to TA Work Plan](#)

4 On the “Edit TA Activity” page, edit details as appropriate and select <Save and Return to Work Plan>.

TA
Edit TA Activity

[Save](#) [Save and Return to TA Work Plan](#) [Cancel](#)

TA Work Plan Number: TDA-T-12-039-04

Work Plan Status: Approved

Grant #:

T-12-NN-37-0024

Work Plan Type:

TA - On Call Assistance

Projected Start Date:

07/01/2016

Projected End Date:

04/17/2021

Original Budget:

\$55,691.35

* Project # / Project Title

NSP12 / NSP

Total Budget (with Amendments):

\$139,328.96

* Proposed Staff Budget:

\$ 100220.95

Previously Approved Budget:

\$92,116.74

Proposed Staff Budget + Total Budget Line Item must <= Total Budget (with Amendments)

5 Edits to work plans will change the work plan status to “Modified.” To submit the modified work plan to HUD for approval, on the “Edit TA Work Plan” page, select “Submitted” from the dropdown in the “Work Plan Status” field. Select <Save and Continue>.

TA
Edit TA Work Plan

• Warning: Activity Performance Measure exists. To change Work Plan type will result in losing the current performance measures.

* Indicates required fields

[Save](#) [Save and Continue](#) [Cancel](#)

Originator: Patricia Martin

Creation Date: 07/19/2016

TA Provider: Training And Development Associates

TA Work Plan

* Grant #

T-12-NN-37-0024

* Work Plan Type

TA - On Call Assistance

Work Plan Category

TA - Tech Asst

* Work Plan #

TDA-T-12-039-04

* Work Plan Status

Approved

Work Plan Close Date

Select Date (mm/dd/yyyy)

* Invoice Period

Monthly

of Budget Amendments (Approved by HUD)

2

Submitted Date

03/11/2020

Associated TA Requests:

Select

[Add TA Request](#)

[Remove Selected TA Request](#)

TA Request Number / Status:

Select Option

Associated Work Plans:

Select

[Add Work Plan](#)

TA Providers:

Select Option

[Remove Selected Work Plan](#)

Work Plan # / Status:

Select Option

* Scope

3/11/20- Mod for a NCE to 4/17/21 to continue On Call TA per CA ext



User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Search/Edit Work Plan
-----------------------------------------------------------------	-------------------------------------------

Tips on Editing a TA Work Plan

The System will automatically change the status of an approved TA Work Plan to “Modified” when the following actions are taken on an “Approved” work plan:

- Adding or deleting a task
- Changing the budget of a task
- Changing the period of performance for a workplan

These changes are often referred to as a Work Plan Amendment. Users will need to change the status to “Submitted” after making these changes and save the workplan again to submit the changes to HUD.

NOTE: Amendments/HUD approval is also required for any Work Plan change that involves actions listed in the Prior Approval section of the award document.

Minor changes (not on the Prior Approval list) are considered a “Work Plan Modification.” TA Providers must note these changes in the Scope field, but HUD re-approval of the Work Plan is not needed. Examples of minor changes: work plan number edits, changing the total budget by less 10% of the original budget approved by HUD.

C3. Grantee | Delete Work Plans

A TA Work Plan may only be deleted if the Work Plan has no associated draws/vouchers. If the TA Work Plan has at least one draw/voucher, then the **<Delete>** link will not show.

User Role: Grantee User (excluding non-TA Provider User)	Menu Option: Search/Edit Work Plan
-----------------------------------------------------------------	-------------------------------------------

Purpose: Allow TA Provider Users to delete a DRGR Work Plan.

Complete the following steps to edit a DRGR Work Plan:

- Follow the steps in Section C1 to search for a Work Plan. Select the **<Delete>** in the “Action” column of the Work Plan to be deleted.

TA
TA Work Plan Search

433 Record(s) Displaying 1 through 10

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown	Blocked	Action
	T-12-NN-37-0024	- NSP3-002	T-12-NN-37-0024 Training And Development Associates	04/17/2012	04/17/2021	07/29/2013	04/08/2020	03/05/2020	Approved			Edit Notes PDF Comments
	TDA-H-13-001-01	H-13-TA-MA-1315	Training And Development Associates	11/01/2015	09/23/2020	11/03/2015	03/20/2020	08/14/2019	Approved			Edit Notes PDF Comments
	TDA-T-12-047-04	T-12-NN-37-0024	Training And Development Associates	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved			Edit Notes PDF Comments
	TDA-T-12-053-04	T-12-NN-37-0024	Training And Development Associates	07/01/2019	12/31/2020	08/07/2019	03/17/2020	03/11/2020	Approved			Edit Notes PDF Comments
	TDA-T-12-048-06	T-12-NN-37-0024	Training And Development Associates	10/01/2017	04/17/2021	10/18/2017	03/17/2020	03/11/2020	Approved			Edit Notes PDF Comments
	TDA-T-12-039-04	T-12-NN-37-0024	Training And Development Associates	07/01/2016	04/17/2021	07/19/2016	03/17/2020	03/11/2020	Approved			Edit Notes PDF Comments
	TDA-T-12-054-04	T-12-NN-37-0024	Training And Development Associates	02/28/2020	09/30/2020	03/05/2020	03/17/2020	03/05/2020	Approved			Edit Notes Delete PDF Comments
	T-12-NN-37-0024	- NSP3-003	T-12-NN-37-0024 Training And Development Associates	06/20/2012	04/17/2021	07/29/2013	03/17/2020	03/11/2020	Approved			Edit Notes PDF Comments
	T-12-NN-37-0024	- NSP3-001	T-12-NN-37-0024 Training And Development Associates	04/17/2012	04/17/2021	07/29/2013	03/17/2020	03/05/2020	Approved			Edit Notes PDF Comments
	TDA-T-12-050-04	T-12-NN-37-0024	Training And Development Associates	06/01/2018	07/31/2019	06/04/2018	03/06/2020		Closed			Edit Notes PDF Comments

Search Again



D. Upload Work Plan Data

Grantee Users of TA Providers organizations can add, edit, cancel, and close Work Plans using HUD's Data Upload templates. These templates allow users to upload information in batches for efficiency. For information on how to use the data upload function, see Chapter 34 of this User Manual.