



Chapter 18: Technical Assistance Work Plan – HUD Review | Manage My Grants Module

Chapter 18: Technical Assistance Work Plan - HUD Review	1
A. Manage My Grants Module Access	1
A1. HUD User Access.....	1
B. HUD Approval/Rejection of a TA Work Plan.....	2
B1. HUD Review Work Plan	2



Chapter 18: Technical Assistance Work Plan - HUD Review

This Chapter provides instruction to HUD users authorized to approve technical assistance Work Plans, in the **Manage My Grants** module. This Chapter describes actions of HUD Users when approving Work Plans submitted by technical assistance provider organizations (TA Providers) and is divided into subsections. The following actions are covered in this Chapter:

Grantee Users

Menu Option	Subsection	Action
Search/Review Work Plan	B1	Search for and Review Work Plans

A. Manage My Grants Module Access

The **Manage My Grants** module contains the Work Plan functions.

A1. HUD | User Access

User Role: HUD User	Menu Option: Manage My Grants Module
Purpose: Allow Grantee Users to access Work Plan actions.	
Complete the following steps to access the Manage My Grants Module:	
<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 DRGR System displays the relevant menu items based on HUD User role.</p>	



B. HUD Approval/Rejection of a TA Work Plan

After a Work Plan is submitted in DRGR by a TA Provider User, an appropriate CPD Representative and other HUD staff included in the related grant user group can take review and approval/rejection action on TA Work Plans with the status of “Submitted.” HUD will use the following steps to approve or reject a TA Work Plan in DRGR.

TIP: See Chapter 4 – Grants and Grantees for a discussion of HUD user groups for a grant.

B1. HUD | Review Work Plan

User Role: HUD User	Menu Option: Search/Review Work Plan
Purpose: Allow HUD to review a TA Work Plan in DRGR.	
Complete the following steps to add a DRGR Work Plan:	
<p>1 Navigate to the Manage My Grants or icon and under the Action Plan menu as described above, and select <Search/Review Work Plan.>. The “Add TA Work Plan” page will load.</p>	
<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>	
<p>3 The results display key features of the TA Work Plan: “Workplan#,” “TA Provider,” “Performance Period,” “Creation Date,” “Last Updated Date,” “Date Submitted,” “Status,” “Drawdown Blocked,” and allowable Actions based on the user role in the “Action” column.</p>	



User Role: HUD User

Menu Option: Search/Review Work Plan

From the “Actions” column, users can view and add notes, download a PDF copy, and view comments for all results. Users will block drawdown rights can also block draws,

Select each column within the search results to sort the list in descending and ascending order.

Use the <Search Again> link to search for additional TA Work Plans.

TA
TA Work Plan Search

839 Record(s) Displaying 11 through 20

First Prev 1 2 3 4 5 6 7 8 9 10 Next Last

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown Blocked	Action
	ABT-E-20-003-05 ESG-CV Products	M-19-TA-VA-0011	ICF Incorporated	05/08/2020	12/31/2022	05/18/2020	06/08/2020	06/08/2020	Approved		Notes Block Drawdown PDF Comments
	c 19 last test	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/01/2021	05/13/2020	05/14/2020	05/13/2020	Approved		Notes PDF Comments
	Test-Jay-20200512-1	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/31/2020	05/12/2020	05/12/2020	05/12/2020	Approved		Notes PDF Comments
	c 19 test	C-19-TA-VA-0011	ICF Incorporated	04/01/2020	04/30/2021	04/27/2020	05/12/2020		Modified		Notes PDF Comments
	test 2 icf 19	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/29/2021	05/08/2020	05/08/2020	05/08/2020	Approved		Notes PDF Comments
	ICF-Test-Test-001	C-18-TA-VA-0011	ICF Incorporated	05/05/2020	05/29/2021	05/07/2020	05/07/2020	05/07/2020	Approved		Notes Block Drawdown PDF Comments
	WP RA 20200427	C-14-TA-VA-0011	ICF Incorporated	01/01/2020	12/31/2020	04/27/2020	04/27/2020		Open		Notes PDF Comments
	bla	H-19-TA-VA-0011	ICF Incorporated	04/01/2020	04/30/2021	04/27/2020	04/27/2020		Open		Notes PDF Comments
	ICF-M-17-009 - ESG IDIS	M-17-TA-VA-0011	ICF Incorporated	07/31/2018	09/30/2020	08/01/2018	04/19/2020	04/02/2020	Approved		Notes Block Drawdown PDF Comments
<input type="checkbox"/>	ICF-M-18-010 - 010 E-Snaps Product	M-18-TA-VA-0011	ICF Incorporated	01/06/2020	12/31/2020	01/14/2020	04/08/2020	04/08/2020	Submitted		Notes Block Drawdown PDF Comments

Search Again

Review

4 To view the TA Work Plan, users select the Work Plan # hyperlink. The “View TA Work Plan” page will load.

TA
TA Work Plan Search

839 Record(s) Displaying 11 through 20

First Prev 1 2 3 4 5 6 7 8 9 10 Next Last

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown Blocked	Action
	ABT-E-20-003-05 ESG-CV Products	M-19-TA-VA-0011	ICF Incorporated	05/08/2020	12/31/2022	05/18/2020	06/08/2020	06/08/2020	Approved		Notes Block Drawdown PDF Comments
	c 19 last test	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/01/2021	05/13/2020	05/14/2020	05/13/2020	Approved		Notes PDF Comments
	Test-Jay-20200512-1	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/31/2020	05/12/2020	05/12/2020	05/12/2020	Approved		Notes PDF Comments
	c 19 test	C-19-TA-VA-0011	ICF Incorporated	04/01/2020	04/30/2021	04/27/2020	05/12/2020		Modified		Notes PDF Comments
	test 2 icf 19	C-19-TA-VA-0011	ICF Incorporated	05/01/2020	05/29/2021	05/08/2020	05/08/2020	05/08/2020	Approved		Notes PDF Comments
	ICF-Test-Test-001	C-18-TA-VA-0011	ICF Incorporated	05/05/2020	05/29/2021	05/07/2020	05/07/2020	05/07/2020	Approved		Notes Block Drawdown PDF Comments
	WP RA 20200427	C-14-TA-VA-0011	ICF Incorporated	01/01/2020	12/31/2020	04/27/2020	04/27/2020		Open		Notes PDF Comments
	bla	H-19-TA-VA-0011	ICF Incorporated	04/01/2020	04/30/2021	04/27/2020	04/27/2020		Open		Notes PDF Comments
	ICF-M-17-009 - ESG IDIS	M-17-TA-VA-0011	ICF Incorporated	07/31/2018	09/30/2020	08/01/2018	04/19/2020	04/02/2020	Approved		Notes Block Drawdown PDF Comments
<input type="checkbox"/>	ICF-M-18-010 - 010 E-Snaps Product	M-18-TA-VA-0011	ICF Incorporated	01/06/2020	12/31/2020	01/14/2020	04/08/2020	04/08/2020	Submitted		Notes Block Drawdown PDF Comments

Search Again

Review

5 On the “View TA Work Plan” page, select <Return to Work Plan Search> to return to search results.



User Role: HUD User **Menu Option:** Search/Review Work Plan

TA
View TA Work Plan

[Return To Work Plan Search](#)

Originator: Kristen Richmond
Creation Date: 05/07/2020
TA Provider: ICF Incorporated

TA Work Plan

Award #: C-18-TA-VA-0011	Work Plan Type: TA Delivering Workshops	Work Plan Category: TA - Wkshp/Clinic
Work Plan #: ICF-Test-Test-001	Work Plan Status: Approved	Work Plan Close Date:
Invoice Period: Monthly	# of Budget Amendments (Approved by HUD): 0	Submitted Date: 05/07/2020

Associated TA Requests:
TA Request: **TA Request Status:**

Associated Work Plans:
TA Providers: **Work Plan #:** **Work Plan Status:**

Scope:

6 From the search results on the “**Search TA Work Plan**” page, select the checkbox in the “**Select**” column next to the TA Work Plan that needs review and approval/rejection and then select **<Review>**. The “**TA Work Plan Approval**” page will load.

TIP: If the checkbox is not available, then the HUD user does not have the appropriate permissions to approve or reject the TA Work Plan. Navigate to the Manage My Grants module, locate the Grants menu, and select **<View Grant>** to confirm TA Work Plan user group permission.

TA
TA Work Plan Search

839 Record(s) Displaying 1 through 10

First Prev 1 2 3 4 5 6 7 8 9 10 Next Last

Select	Work Plan #	Award #	TA Provider	Period From	Period To	Creation Date	Last Update Date	Date Submitted	Status	Drawdown	Blocked	Action
<input type="checkbox"/>	ICF-O-14-043 HOME Notice Guidance and FAQ	C-14-TA-VA-0011	ICF Incorporated	01/03/2016	09/30/2020	05/31/2017	10/31/2020	05/19/2020	Approved			Notes Block Drawdown PDF Comments
<input type="checkbox"/>	TEST 2	T-12-NN-51-0021	ICF Incorporated	11/30/2020	12/30/2021	10/31/2020	10/31/2020		Open			Notes PDF Comments
<input type="checkbox"/>	TEST	T-12-NN-51-0021	ICF Incorporated	11/30/2020	12/30/2021	10/31/2020	10/31/2020		Open			Notes PDF Comments
<input type="checkbox"/>	WPX-20-TA-8-22417-Development002	X-20-TA-8-22417	ICF Incorporated	01/01/2020	12/31/2021	07/18/2020	09/23/2020	09/23/2020	Submitted			Notes Block Drawdown PDF Comments
<input checked="" type="checkbox"/>	ICF-C-17-043 - 043 CC17 HOME Monitoring Webinars	C-17-TA-VA-0011	ICF Incorporated	10/23/2019	12/31/2021	03/16/2020	09/23/2020	09/23/2020	Submitted			Notes Block Drawdown PDF Comments
<input type="checkbox"/>	WP 20200427 001	C-15-TA-VA-0011	ICF Incorporated	01/01/2020	12/31/2020	04/27/2020	09/14/2020		Open			Notes PDF Comments
<input type="checkbox"/>	WPX-20-TA-8-22417-Development001	X-20-TA-8-22417	ICF Incorporated	01/01/2020	12/31/2020	07/18/2020	08/24/2020		Open			Notes Block Drawdown PDF Comments
<input type="checkbox"/>	mj est workplan 07182020	X-20-TA-8-11174	ICF Incorporated	07/18/2020	07/18/2020	07/18/2020	07/18/2020	07/18/2020	Approved			Notes Block Drawdown PDF Comments
<input type="checkbox"/>	WPX-20-TA-8-22417-Development003	X-20-TA-8-22417	ICF Incorporated	01/01/2020	12/31/2020	07/18/2020	07/18/2020		Open			Notes Block Drawdown PDF Comments
<input type="checkbox"/>	Test Zero\$ WP	Y-19-TA-VA-0011	ICF Incorporated	05/01/2020	10/31/2020	06/03/2020	06/09/2020	06/09/2020	Submitted			Notes Block Drawdown PDF Comments

[Search Again](#)

7 On the “**TA Work Plan Approval**” page, select the radio button next to “**Approve**” or “**Reject.**” Add comments in the narrative box provided.

Select **<Save>** to submit the action and comments in DRGR. The System automatically sends an email with the HUD action taken to the TA Provider User who created the Work Plan.

Select **<Cancel>** to return to the previous screen without saving the comments or approval action.



User Role: HUD User	Menu Option: Search/Review Work Plan
TA TA Work Plan Approval <input type="radio"/> Approve <input type="radio"/> Reject	
Please enter review comments <div style="border: 1px solid #ccc; height: 100px;"></div>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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