



Chapter 22: Performance Report – Submission and Approval | Manage My Grants Module

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Chapter 22: Performance Report - Submission and Approval | Manage My Grants Module

This Chapter provides instruction to Grantee Users, to submit Performance Reports to HUD for approval, within the **Manage My Grants** module. This Chapter also explains the process for HUD Users to review Performance Reports.

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

Grantee Users		
Menu Option	Subsection	Action
Manage Performance Report	B4	Edit and Submit Performance Report for review

HUD Users

Menu Option	Section	Action
Review Performance Report	C1	Review Performance Report

A. Manage My Grants Module Access

The **Manage My Grants** module contains access to Performance Report actions, for both Grantee and HUD users.

A1. Grantee | User Access

User Role: Grantee User	Menu Option: Manage My Grants Module
Purpose: Allow Grantee Users to access Performance Report actions.	
<input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants Module:	
1 Select the Manage My Grants module, or icon, located in the navigation menu.	



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

Manage My Grants

- ACTION PLANS**
 - Add Action Plan
 - Manage Action Plan
 - View Action Plan
 - Download Action Plan
 - Search Action Plans
 - Review Tools
 - Lookup Consolidated Plans
- PROJECTS**
 - Add Project
 - Search Projects
- ACTIVITIES**
 - Add Activity
 - Search Activities
 - Restore Activities
- GRANTEE PROGRAMS**
 - Add Grantee Program
 - Search Grantee Programs
- PERFORMANCE REPORTS**
 - Manage Performance Report
 - Search Performance Reports
 - Manage Addresses

A2. HUD | User Access

User Role: HUD User	Menu Option: Manage My Grants Module
Purpose: Allow HUD Users to access Performance Report actions.	
Complete the following steps to access the Manage My Grants Module:	
1 In the DRGR System, click 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.

Manage My Grants

- ACTION PLANS**
 - Manage Action Plan
 - View Action Plan
 - Download Action Plan
 - Review Action Plan
 - Search Action Plans
 - Review Tools
 - Lookup Consolidated Plans
- PROJECTS**
 - Search Projects
- ACTIVITIES**
 - Search Activities
- GRANTEE PROGRAMS**
 - Search Grantee Programs
- PERFORMANCE REPORTS**
 - Manage Performance Report
 - Review Performance Report
 - Search Performance Reports



B. Performance Report Submissions

Timely submission of Performance Reports in the DRGR System is an important step in reporting accomplishments and complying with Grant award requirements. Performance Reports are due no more frequently than 30 days after the end of each quarter for HUD review and approval, as noted in the table below. However, Grantees should consult the award terms and conditions for specific due dates.

PROGRAM PROCESS RECOMMENDATION:

Most Grants require quarterly submission of Performance Reports, however, NSP and PFS reporting deadlines vary:

- NSP 2 Grants report quarterly, however, their reporting deadline is 10 days after the end of each quarter.
- After NSP Grants are “Closed with Ongoing Reporting,” their reporting cycle changes to annually.
- The PFS program requires semi-annual submission of Performance Reports.

Quarterly Performance Report Submission Dates

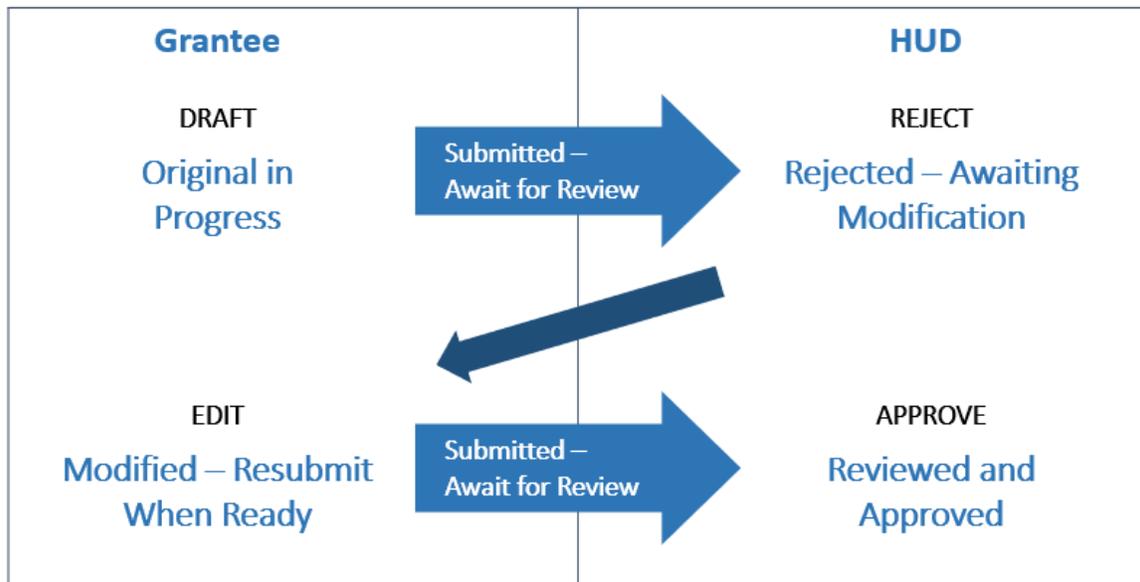
Reporting Period End Date	Grantee Submission Deadlines
31-March	30-Apr
30-Jun	30-Jul
30-Sep	30-Oct
31-Dec	30-Jan

B1. Performance Report Status

The DRGR System workflow for a Performance Report is illustrated in the figure below titled, “Performance Report Submission and Review Workflow.” The illustrated workflow of the Performance Report includes both a Grantee and HUD, and the various statuses of the Performance Report throughout the workflow. The Performance Report starts in “Original—In Progress” status. Performance Reports stay in this status until submitted to HUD, at which time the status changes to “Submitted—Await for Review.” At this point, HUD CPD Representatives review the Performance Report and either approve the report or reject the Report. If rejected, the Performance Report is changed to a status of “Rejected—Await for Modification” and returned to the Grantee to edit and resubmit. When the Grantee edits the Report, the status is changed to “Modified—Resubmit when Ready” until the plan is resubmitted to HUD for review by the Grantee. If HUD approves the Report, the Report status shows as “Reviewed and Approved.”



Performance Report Submission and Review Workflow



B2. Review Tools

Performance Report Review Tools allow a Grantee User to check compliance with required elements of the plan and review the plan’s content for accuracy and completeness. The Grantee’s HUD CPD Representative uses these same Review Tools in conducting the Performance Report review. Chapter 21 – Performance Report Review Tools discusses Grantee User and HUD User Review Tools functions. Using the tools in advance of the Performance Report submission can make for an easier and faster HUD review, and reduce the number of report rejections by HUD. The Review Tools allow Grantees and HUD to review compliance elements in the Performance Report checklist and displays any active flags.

PROGRAM PROCESS RECOMMENDATIONS:

Not every program using DRGR uses the Review Tools function. For these programs, Review Tools will not contain any information. Grantee Users of programs that use Review Tools, however, are encouraged to use them to ensure a quality and compliant submission (see Chapter 21 – Performance Report Review Tools).

B3. Troubleshooting

It is important for Grantees to keep some DRGR rules in mind when attempting to submit a Performance Report for HUD review. If a Grantee user is unable to edit and/or submit the Performance Report, then it is likely because one of the following common situations:

- **A Grantee User cannot edit a Performance Report that has been submitted for review.** To edit the Performance Report, a HUD User that can view the Grant (e.g. your CPD Representative) will need to reject the Performance Report so that the Grantee User can make the changes.



- **A Grantee User cannot submit a Performance Report unless the User has the “Submit Performance Report” role.** Only users with the “Submit Performance Report” role can submit Performance Reports. Grantee Users can, however, edit Performance Reports, even without the “Submit Performance” role. See Chapter 5 – User Management and Certification for instructions on adding additional user roles.
- **A Grantee User cannot submit a Performance Report unless the Action Plan has a status of “Reviewed and Approved.”** If a Grantee User has modified the Action Plan, a HUD User that can view the Grant (e.g. your CPD Representative) must approve the Action Plan before Grantee User can submit the Performance Report. To resolve this issue, contact your CPD Representative.
- **Reasons a Grantee User cannot edit a Performance Report may include (1) the Grantee User is not active, or (2) the Grant is not active, or (3) the Grantee User does not have edit capabilities.** Grantee User accounts designated as “View Only” cannot edit Performance Reports, however, Regular Grantee Users associated to a Grant can edit the Performance Report without additional roles. Grantee User should have their Grantee Administrator confirm that their DRGR account is active and certified. See Chapter 5 – User Management and Certifications for these processes. To confirm if Grant is inactive in DRGR, navigate to the **Manage My Grants** module and locate the **Grants** menu. Select the **<View Grant>** link. The **“View Grant”** page will load. The status field will indicate whether the Grant is active. If the status is incorrect, contact your CPD Representative or DRGRHelp@hud.gov.

B4. Grantee | Submit Performance Report

This action allows the Grantee User to submit the Performance Report to HUD for review and approval.

User Role: Grantee User	Menu Option: Manage Performance Report
Purpose: Allow Grantee Users to edit and submit the DRGR Performance Report for HUD review.	
Complete the following steps to submit a DRGR Performance Report:	
1. Navigate to the Manage My Grants module and ensure the decided Grant is locked in the Select Grant bar. Locate the Performance Reports menu. See Step A1 above. Select the <Manage Performance Report> link. The “Manage Performance Report” page will load.	



- 2 Select the **<Edit>** link in the “Action” column next to the desired reporting period.

TIP: Grantee Users should ensure that Performance Reports are submitted in order. Complete the Performance Report for the most recently ended quarter before submitting the next Performance Report.

PERFORMANCE REPORT
Manage Performance Reports - Georgia

Grant Number: B-18-DP-13-0001 Contract Start Date: 06/27/2019
Grant Status: Active Contract End Date:
Grant Award Amount: \$37,943,000.00 LOCCS Authorized Amount: \$37,943,000.00

* - Actual period does not match Reporting period

Due Date	Reporting Period	Action	Date Submitted	Type	Status	Submitter
01/30/2021	10/01/2020 - 12/31/2020	Add				
10/30/2020	07/01/2020 - 09/30/2020	View Delete Download Print Version Edit			Original - In Progress	
07/30/2020	04/01/2020 - 06/30/2020	View Delete Download Print Version Edit			Original - In Progress	
04/30/2020	01/01/2020 - 03/31/2020	View Delete Download Print Version Review Tools	04/29/2020		Reviewed and Approved	B68510 - Tremblay, Kathleen
01/30/2020	10/01/2019 - 12/31/2019	View Delete Download Print Version Review Tools	01/30/2020		Reviewed and Approved	B68510 - Tremblay, Kathleen
10/30/2019	07/01/2019 - 09/30/2019	View Delete Download Print Version Review Tools	10/29/2019		Reviewed and Approved	B68510 - Tremblay, Kathleen

- 2 Once all Performance Report data has been entered into the DRGR System (See Chapter 19 – Performance Report Overview), select **<Save>**. Authorized Grantee Users can use the **<Submit>** button to submit the Performance Report to HUD.

PERFORMANCE REPORT
Edit Performance Report

*Indicates Required Field

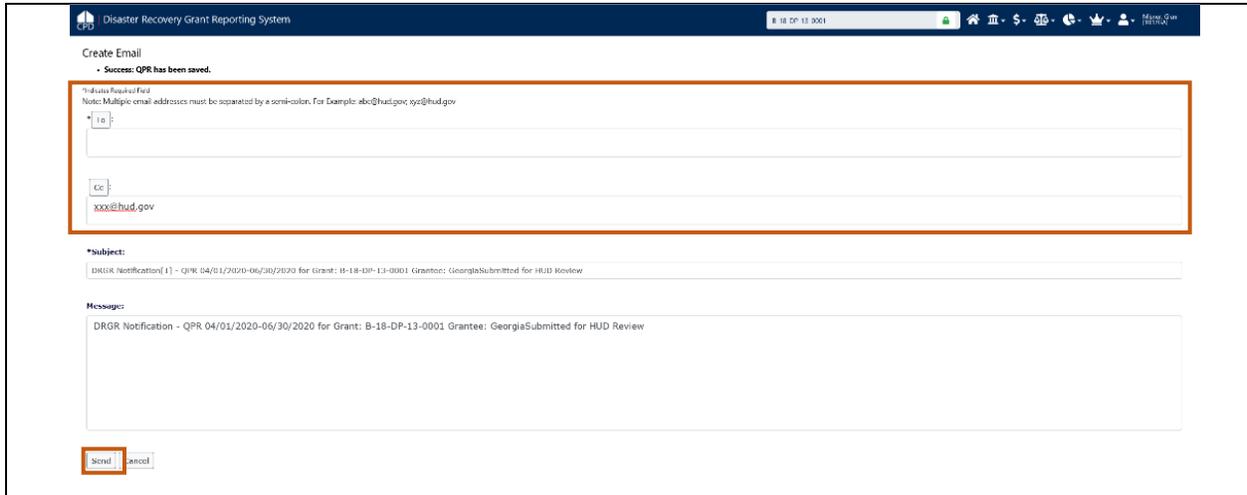
Grant Number: B-18-DP-13-0001 Contract Start Date: 06/27/2019 QPR Start Date: 04/01/2020
Grantee Name: Georgia Contract End Date: QPR End Date: 06/30/2020

Save **Submit** Cancel Edit QPR Upload QPR Data

View QPR Report

Use Existing Contact
Select Contact
Add New Contact

- 3 If the Performance Report is submitted, DRGR will load the “Create Email” page which allows the Grantee User to notify the reviewer(s) that the Performance Report is ready for review. Complete the **<To>** and **<Cc>** dialogue boxes to add additional recipients to the email. When complete, select **<Send>**.



4 If successful, the page will display a “Email sent successfully” message.



C. Performance Report Reviews

HUD Reviewers review and approve or reject submitted Performance Reports, within 30 days or less if possible. HUD review is specific to the Grant appropriation and is focused on the Grantee’s compliance with the Grant requirements as well as the accuracy and completeness of information. The review allows the CPD Representative to understand how the Grant program is progressing.

As part of this review, HUD Reviewers utilize the “Review Screen” and “Review Tools” feature to access the **Performance Report Checklist**, provide comments on active activities and flags, enter overall review comments, and attach supporting documents (See Chapter 21 – Performance Report Review Tools). Grantees should use these same Review Tools prior to submitting their Performance Report to ensure a smooth and efficient HUD review.

C1. HUD | Review Performance Report

User Role: HUD User	Menu Option: Review Performance Report
Purpose: Allow HUD Users to review and approve or reject the DRGR Performance Report.	
Complete the following steps to review and approve or reject a DRGR Performance Report:	
1 Navigate to the Manage My Grants module and locate the Performance Reports menu. Select the <Review Performance Report> link. See Step A2 above. The “ Review Performance Report ” page will load.	



User Role: HUD User

Menu Option: Review Performance Report

- 1 On the “Review Performance Reports” page, select the <Review> link for the Performance Report that has been submitted for review.

PERFORMANCE REPORT
Review Performance Reports - Georgia

Grant Number: 8-08-DN-13-0001 Contract Start Date: 03/05/2009
 Grant Status: Active Contract End Date:
 Grant Award Amount: \$77,085,125.00 LOCES Authorized Amount: \$77,085,125.00
 ** - Actual period does not match Reporting period

Date Date	Reporting Period	Action	Date Submitted	Type	Status	Submitter
10/30/2020	07/01/2020 - 09/30/2020	View Delete Download Print Version Review Tools			Original - In Progress	
07/30/2020	01/01/2020 - 06/30/2020	View Delete Download Print Version Review Tools			Original - In Progress	
04/30/2020	01/01/2020 - 03/31/2020	View Delete Download Print Version Review Tools			Original - In Progress	
01/30/2020	10/01/2019 - 12/31/2019	View Delete Download Print Version Review	08/27/2020		Submitted - Await for Review	T018CA - Erdmann, Jen
10/30/2019	07/01/2019 - 09/30/2019	View Delete Download Print Version Review Tools	10/30/2019		Rejected - Await for Modification	B68510 - Tremblay, Kathleen
07/30/2019	04/01/2019 - 06/30/2019	View Delete Download Print Version Review Tools	07/29/2019		Reviewed and Approved	C22834 - Shaw, Robert
04/30/2019	01/01/2019 - 03/31/2019	View Delete Download Print Version Review Tools	01/20/2019		Reviewed and Approved	B06364 Mrs. Sally

- 2 The “Review QPR” page loads. From this page the HUD user can easily:

- a. Review Submission Comments from the Grantee;

PERFORMANCE REPORT
Review QPR

Grant Number: 8-08-DN-13-0001 Contract Start Date: 03/05/2009 QPR Start Date: 10/01/2019
 Grantee Name: Georgia Contract End Date: QPR End Date: 12/31/2019
 Contract Name: Contract Email:

Status:
 Submitted - Await for Review
 Save Review | Cancel Review QPR

SUBMISSION COMMENTS
 Grantee Submission Comments:
 None

- b. Add review comments;
- c. Add supporting documents to the review; and
- d. Access the “Review Checklist” and flags.



User Role: HUD User

Menu Option: Review Performance Report

HUD Review Comments:

ADD DOCUMENTS IN SUPPORT OF REVIEW

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

None

Add Additional Documents | Remove Selected Document

Review Checklist

- Overall Progress Review [Edit](#) NSP
- Activity Progress Review [Edit](#) NSP
- NSP - I Specific Requirements [Edit](#) NSP

FLAGS

Search Activities For Adding Comments

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

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

|

0 Record(s) No more Record(s) on this page

No records are found.

QPR Review Version History

Date	loginid	Status	User	Comments

Status	Date	Action
Active	In Progress	View PDF

Review Checklist History

|

3 After completing the review, the HUD user can change the status of the Performance Report to Approved or Rejected using the status dropdown options. Select **<Save Review>** to save the changes. Grantee Users can view review comments, updates to the Review Checklist, and supporting documents added by HUD in the Review Tools feature. For more information, see Chapter 21 – Performance Report Review Tools.

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PERFORMANCE REPORT

Review QPR

Grant Number: 0-19-016-13-0001 Contract Start Date: 03/05/2019 QPR Start Date: 10/01/2019

Grantee Name: Georgia Contract End Date: QPR End Date: 12/31/2019

Contact Name: Contact Email:

Status:

Submitted - Awaiting for Review |

SUBMISSION COMMENTS

Grantee Submission Comments: None