



Chapter 8: Technical Assistance Staff and Rates | Administration Module

Chapter 8: Technical Assistance Staff and Rates	1
A. Administration Module Access	1
A1. Grantee User Access	2
A2. HUD User Access	2
B. Manage Staff Types	3
B1. TA Provider and HUD Users Search Staff Type	3
B2. TA Provider Add Staff Type	5
B3. TA Provider Edit Staff Type	9
B4. TA Provider Delete Staff Type	10
B5. TA Provider View HUD Comments	11
B6. HUD User Access Review Staff Types	12
C. Manage TA Staff	13
C1. TA Provider Search Staff	14
C2. TA Provider Add Staff	15
C3. TA Provider Edit Staff	17
C4. TA Provider Delete Staff	19



Chapter 8: Technical Assistance Staff and Rates

Grantee Users associated with technical assistance provider organizations (TA Providers) use DRGR to manage their cooperative agreements with HUD. TA Providers with the Staff Rate role (see Chapter 5 – User Management and Certifications) must use the **Administration** module to set up hourly labor rates for all personnel (e.g., staff, contractor, and consultant persons) expected to work under the TA award. HUD approval of personnel and labor rates is required before TA Providers can add staff to TA work plans in DRGR. See Chapter 17 – Technical Assistance Work Plans for more information.

This Chapter describes actions for TA Provider and HUD Users, and is divided into subsections. Note: In addition to the processes described below, information for rates and staff can be uploaded in DRGR. See Chapter 34 – Data Uploads for more information. The following actions are covered in this Chapter:

TA Provider Users

Menu Option	Subsection	Action
Manage Staff Types	B1 – B5	Add, edit, delete, view, and search for TA Provider staff types; view HUD comments on Staff Types.
Manage TA Staff	C1 – C4	Add, edit, delete, view, and search for TA Provider staff.
Upload Staff Data	--	See Chapter 34: Data Uploads

HUD Users

Menu Option	Section	Action
Review Staff Types	B6	Search, review, and approve TA Provider staff and rates
Upload Staff Data	--	See Chapter 34: Data Uploads

A. Administration Module Access

The **Administration** module contains all user management functions, including functions to manage TA staff and manage TA staff rates. The functions that reference TA apply to Grantee Users who are both associated with TA Providers and have the Staff Rate role in DRGR. The functions also apply to HUD users in a Staff Rate user group for a TA Provider.



A1. Grantee | User Access

User Role: Grantee User	Menu Option: Administration Module
Purpose: Allow Grantee Users associated with TA Providers to access Staff Rate actions.	
Complete the following steps to access the Administration Module:	
1 In the DRGR System, select the Administration module, or icon, located in the navigation menu.	
2 This opens the dropdown menu items for the Administration module. The System displays the relevant menu items based on user type and user roles.	

A2. HUD | User Access

User Role: HUD User	Menu Option: Administration Module
Purpose: Allow HUD Users to access Staff Rate actions.	
Complete the following steps to access the Administration Module:	
1 In the DRGR System, select the Administration module, or icon, located in the navigation menu.	



User Role: HUD User	Menu Option: Administration Module
----------------------------	---

2 This opens the dropdown menu items for the **Administration** module. The System displays the relevant menu items based on user type and user roles.

Administration

<p>USER MANAGEMENT</p> <ul style="list-style-type: none"> Certify Grantee Admin Users Certify Grantee Users Certify HUD Office Users Request New Users Manage Existing Users Review Staff Types Upload User Requests Upload Staff Data 	<p>MANAGE GRANTEES</p> <ul style="list-style-type: none"> Search Grantees Search/View Responsible Organizations 	<p>UTILITIES</p> <ul style="list-style-type: none"> Upload FAQs
---	--	--

B. Manage Staff Types

The System allows authorized users of TA Providers to add, edit, delete, view, and search for Staff Types and Rates, which require HUD approval. Authorized users may also view HUD comments on staff types. These actions are completed using the <Manage Staff Types> link in the **Administration** module. Note that authorized users of this function are those with the Staff Rate role.

B1. TA Provider and HUD Users | Search Staff Type

Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role), as well as, CPD Representatives assigned to an award can search for rates associated with that award in DRGR.

User Role: Grantee Users and HUD Users	Menu Option: Manage Staff Types
---	---

Purpose: Allow TA Provider to search existing staff types.

Complete the following steps to search existing Staff Types:

- 1 To search for a Staff Type, navigate to the **Administration** module and locate the **Staff Rates** menu. See A1 above. Select the <Manage Staff Types> link. (Note: If the user does not have the Staff Rate role, then the <Manage Staff Types> link is not available.) The “Manage Staff Types” page will load.
- 2 On the “Manage Staff Types” page, enter search criteria to access the desired Staff Type. See “Search Staff Type Fields” table below for description of search fields. After desired fields are populated, choose <Search>. Search results will load.



User Role: Grantee Users and HUD Users

Menu Option: Manage Staff Types

STAFF TYPES

Manage Staff Types

Search Criteria

Staff Type:

Staff Rate Status:

Rate Type:

Occupational Type:

3 In the search results, the user can sort the results using the headers for the search results. Select the <Search Again> link or the <Reset> button to restart the search.

STAFF TYPES

Manage Staff Types

Search Criteria

Staff Type:

Staff Rate Status:

Rate Type:

Occupational Type:

5639 Record(s) Displaying 1 through 10

Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action
ABP Associates - Patricio, TBD		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
Ajan *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Campbell, Warren	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Hagood, Chelsea	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Matute, Glenda	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Bridget	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jade *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jesse	TBD	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Alisha Williams *2014	TBD	Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Williams, Alisha *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates, LLC - Alisha Williams *2015	TBD	Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments

Search Staff Type Fields

Field	Guidance
Staff Types	Defined by the TA Provider based on HUD guidance.
Staff Rate Status	Dropdown menu includes: Approved (e.g., rates approved by HUD), Inactive (e.g., rates no longer used for billing), Pending Approval (e.g., rates submitted for and still pending HUD approval), and Rejected (e.g., rates not approved by HUD)
Rate Type	Dropdown menu includes: Staff, Contractor, and Consultant, Subrecipient. These terms are defined by HUD.
Occupation Type	Dropdown includes those associated with existing rates in the System.



B2. TA Provider | Add Staff Type

Authorized users of TA Providers (i.e, Grantee Users with the Staff Rate role can add new staff types to DRGR.

PROGRAM PROCESS RECOMMENDATION: TA Providers are responsible for complying with HUD Wage Rate standards and submitting the appropriate staff rate information for HUD approval, including submitting supporting documents for certain rates and definitions for the options under Occupation Type in DRGR. These standards are available online at https://www.hud.gov/program_offices/comm_planning/about/cpdata/guidance.

User Role: Grantee User	Menu Option: Manage Staff Types																																																																																																																									
Purpose: Allow TA Provider to add Staff Types.																																																																																																																										
<input checked="" type="checkbox"/> Complete the following steps to add a new Staff Type:																																																																																																																										
<ol style="list-style-type: none"> To add a Staff Type, navigate to the Administration module, locate the Staff Rate menu, and locate the Staff Rates menu. See A1 above. Select the <Manage Staff Types> link. (Note: If the user does not have the Staff Rate role, then the <Manage Staff Types> link is not available.) The “Manage Staff Types” page will load. 																																																																																																																										
<ol style="list-style-type: none"> On the “Manage Staff Types” page, select the <Add Staff Type> link. The “Add Staff Types” page will load. 																																																																																																																										
<div style="border: 1px solid #ccc; padding: 10px;"> <p>STAFF TYPES Manage Staff Types</p> <p>Search Criteria</p> <p>Staff Type: <input type="text"/> Staff Rate Status: <input type="text" value="Select Option"/> Rate Type: <input type="text" value="Select Option"/> Occupational Type: <input type="text" value="Select Option"/></p> <p><input type="button" value="Search"/></p> <p>5639 Record(s) Displaying 1 through 10</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th>Staff Type</th> <th>Rate Type</th> <th>Occupational Type</th> <th>Effective Date</th> <th>Base Rate(\$)</th> <th>Fringe Rate(\$)</th> <th>Overhead Rate (\$)</th> <th>GA Rate (\$)</th> <th>Total Rate(\$)</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>ADP Associates - Patricio, TBD</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>03/01/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Campbell, Warren *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Hagood, Chelsea *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Matute, Glenda *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Wiles, Bridget *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Wiles, Jade *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADP - Wiles, Jesse *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>03/01/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADW & Associates - Alisha Williams *2014</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>01/01/2014</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADW & Associates - Williams, Alisha *2016</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/25/2016</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> <tr> <td>ADW & Associates, LLC - TBD</td> <td>Business Analyst I</td> <td>Business Analyst I</td> <td>02/20/2015</td> <td>\$1.00</td> <td>\$1.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2.00</td> <td>Inactive</td> <td>Edit Delete Comments</td> </tr> </tbody> </table> <p><input type="button" value="Add Staff Type"/></p> </div>		Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action	ADP Associates - Patricio, TBD	Business Analyst I	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Campbell, Warren *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Hagood, Chelsea *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Matute, Glenda *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Wiles, Bridget *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Wiles, Jade *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADP - Wiles, Jesse *2016	Business Analyst I	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADW & Associates - Alisha Williams *2014	Business Analyst I	Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADW & Associates - Williams, Alisha *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments	ADW & Associates, LLC - TBD	Business Analyst I	Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action																																																																																																																
ADP Associates - Patricio, TBD	Business Analyst I	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Campbell, Warren *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Hagood, Chelsea *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Matute, Glenda *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Wiles, Bridget *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Wiles, Jade *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADP - Wiles, Jesse *2016	Business Analyst I	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADW & Associates - Alisha Williams *2014	Business Analyst I	Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADW & Associates - Williams, Alisha *2016	Business Analyst I	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
ADW & Associates, LLC - TBD	Business Analyst I	Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments																																																																																																																
<ol style="list-style-type: none"> On the “Add Staff Types” page, complete all information marked with an asterisk. See chart below for guidance on completing these fields. 																																																																																																																										



User Role: Grantee User

Menu Option: Manage Staff Types

ADD STAFF TYPES

* indicates required fields

*Staff Type:	<input type="text"/>
*Effective Date:	06/12/2020
	Select Date (ex: mm/dd/yyyy)
*Rate Type:	TBD
*Occupational Type:	TBD
*Base Rate/Hour(\$):	<input type="text"/>
*Fringe Rate(\$):	<input type="text"/>
*Overhead Rate(\$):	<input type="text"/>
*General & Admin Rate(\$):	<input type="text"/>
*Total Rate per Hour(\$):	<input type="text"/>
Current Status:	
*Status:	Pending Approval

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg

None

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

Save | Cancel

- To add supporting documents to the Staff Type, select the **<Add Additional Documents>** link. This action opens a field to browse. Select the **<Browse>** link. This action opens a window to choose a file to upload into DRGR. Choose a file and select **<Open>**. To remove documents, select the checkbox for the document and then select **<Remove Selected Document>**.

ADD STAFF TYPES

* indicates required fields

*Staff Type:	<input type="text"/>
*Effective Date:	06/12/2020
	Select Date (ex: mm/dd/yyyy)
*Rate Type:	TBD
*Occupational Type:	TBD
*Base Rate/Hour(\$):	<input type="text"/>
*Fringe Rate(\$):	<input type="text"/>
*Overhead Rate(\$):	<input type="text"/>
*General & Admin Rate(\$):	<input type="text"/>
*Total Rate per Hour(\$):	<input type="text"/>
Current Status:	
*Status:	Pending Approval

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg

None

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

Save | Cancel



User Role: Grantee User

Menu Option: Manage Staff Types

- To save and submit the Staff Type to HUD, select **<Save>**. Or to cancel submission of the Staff Type, select **<Cancel>**.

ADD STAFF TYPES
* indicates required fields

*Staff Type:

*Effective Date: 06/12/2020
Select Date (ex: mm/dd/yyyy)

*Rate Type: TBD

*Occupational Type: TBD

*Base Rate/Hour(\$):

*Fringe Rate(\$):

*Overhead Rate(\$):

*General & Admin Rate(\$):

*Total Rate per Hour(\$):

Current Status:
*Status: Pending Approval

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg
None
[Add Additional Documents](#) | [Remove Selected Document](#)

Save Cancel

- After selecting **<Save>**, DRGR displays an **“Send Email”** page. The user may add or remove email addresses and edit the email message before it is sent. Choose **<Send Email>** to send the email notice to the email addresses identified or choose **<Cancel>** to not send any notice.

Send Email

Email Notification for TA Staff Program Analyst

*Indicates Required Field

To
addanyemailaddress@hud.gov, removeanyemailaddress@hud.gov

Cc
test@hud.gov

Subject:
DRGR Notification[35] - <subject can be edited>

Message:
DRGR Notification[35] - <message can be edited>

Send Email Cancel



Add Staff Type Fields

All fields marked with an asterisk are required.

Field	Guidance
Staff Type*	Enter an appropriate staff type; use HUD guidance to complete this field.
Effective Date*	Enter a date in the proper format (mm/dd/yyyy).
Rate Type*	Defaults to “TBD”; select a rate type from the dropdown menu (staff, consultant, contractor).
Occupation Type*	Defaults to “TBD”; select an occupation type from the dropdown menu. The options in the dropdown are defined in HUD guidance related to rates.
Base Rate/Hour(\$)*	Enter a numeric value in each field (zero is an acceptable value); do not use the dollar sign (\$).
Fringe Rate(\$)*	Enter a numeric value in each field (zero is an acceptable value); do not use the dollar sign (\$).
Overhead Rate(\$)*	Enter a numeric value in each field (zero is an acceptable value); do not use the dollar sign (\$).
General & Admin Rate(\$)*	Enter a numeric value in each field (zero is an acceptable value); do not use the dollar sign (\$).
Total Rate per Hour(\$)*	Enter a numeric value in each field (zero is an acceptable value); do not use the dollar sign (\$).
Current Status	Populates the current approval status of the rate.
Status*	Defaults to pending approval; select “Inactive” to deactivate the rate. Do not deactivate a rate unless all reimbursement payments are complete, including indirect cost rate adjustments, and all associated TA work plans have a “Closed” status in DRGR.



B3. TA Provider | Edit Staff Type

Authorized users of TA Providers (i.e, Grantee Users with the Staff Rate role can correct mistakes or change information on existing rates in DRGR.

User Role: Grantee User	Menu Option: Manage Staff Types
--------------------------------	--

Purpose: Allow TA Provider to edit staff types.

Complete the following steps to edit an existing Staff Type:

- 1 To edit a Staff Type, follow the steps in Section B1 above to search for the Staff Type.
- 2 In the search results, select the **<Edit>** link under the Action column for the Staff Type to be edited. The **“Edit Staff Types”** page will load.

STAFF TYPES
Manage Staff Types

Search Criteria

Staff Type: Staff Rate Status: Rate Type: Occupational Type:

5639 Record(s) Displaying 1 through 10

Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action
ADP Associates - Patricio, TBD		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
Alan *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Campbell, Warren *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Hagood, Chelsea *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Matute, Glenda *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Bridget *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jade *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jesse *2016	TBD	Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Aisha Williams *2014	TBD	Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Williams, Aisha *2016	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates, LLC - Aisha Williams *2015	TBD	Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments

The remainder of this page is intentionally left blank.



- 3 On the “Edit Staff Type” page, edit information as appropriate. Select <Save> to submit changes to HUD for approval. Select <Cancel> to cancel the edits.

EDIT STAFF TYPE

* indicates required fields

*Staff Type: ABP Associates - Doe, Jane *2020

*Effective Date: 01/01/2020
Select Date (ex: mm/dd/yyyy)

*Rate Type: TBD

*Occupational Type: Business Analyst I

*Base Rate/Hour(\$): 1.00

*Fringe Rate(\$): 1.00

*Overhead Rate(\$): 0.00

*General & Admin Rate(\$): 0.00

*Total Rate per Hour(\$): 2.00

Current Status: Inactive

*Status: Pending Approval

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc

None

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

Save **Cancel**

B4. TA Provider | Delete Staff Type

Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role can delete rates in DRGR. Note: Rates associated with TA work plans cannot be deleted; users may delete only those rates not associated with work plans.

User Role: Grantee User	Menu Option: Manage Staff Types
Purpose: Allow TA Provider to delete staff types.	
<input checked="" type="checkbox"/> Complete the following steps to delete an existing Staff Type:	
1 To delete a Staff Type, follow the steps in Section B1 above to search for the Staff Type.	
2 In the search results, select the <Delete> link under the Action column for the Staff Type to be deleted.	



User Role: Grantee User **Menu Option:** Manage Staff Types

STAFF TYPES
Manage Staff Types
 Search Criteria

Staff Type: Staff Rate Status: Rate Type: Occupational Type:

5639 Record(s) Displaying 1 through 10

Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action
ABP Associates - Patricio, TBD		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
Alan *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Campbell, Warren *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Hagood, Chelsea *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Matute, Glenda *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Bridget *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jade *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jesse *2016		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Alisha Williams *2014		Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Williams, Alisha *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates, LLC - Alisha Williams *2015		Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments

3 A message will load asking the user to confirm the deletion. Select <Ok> to confirm deletion or <Cancel> to make no changes.

Message from webpage

Are you sure to delete this Staff Type?

Base Rate(\$)	Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action
\$1.00	\$1.00	\$1.00	\$4.00	Approved	Edit Delete Comments
\$1.00	\$1.00	\$1.00	\$4.00	Approved	Edit Delete Comments

B5. TA Provider | View HUD Comments

Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role as well as CPD Representatives assigned to an award can view HUD comments for rates associated with that award in DRGR.

User Role: Grantee User **Menu Option:** Manage Staff Types

Purpose: Allow TA Provider to view HUD comments.

Complete the following steps to review HUD comments:

- To review HUD comments on a Staff Type, follow the steps in Section B1 above to search for the Staff Type.
- In the search results, select the <Comments> link under the Action column for the Staff Type to be viewed.



User Role: Grantee User

Menu Option: Manage Staff Types

STAFF TYPES

Manage Staff Types

Search Criteria

Staff Type: Staff Rate Status: Rate Type: Occupational Type:

5639 Record(s) Displaying 1 through 10

Staff Type	Rate Type	Occupational Type	Effective Date	Base Rate(\$)	Fringe Rate(\$)	Overhead Rate (\$)	GA Rate (\$)	Total Rate(\$)	Status	Action
ABP Associates - Patricio, TBD		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
Alan *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Campbell, Warren *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Hagood, Chelsea *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Hatute, Glenda *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Bridget *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jade *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADP - Wiles, Jesse *2016		Business Analyst I	03/01/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Alisha Williams *2014		Business Analyst I	01/01/2014	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates - Williams, Alisha *2016		Business Analyst I	02/25/2016	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments
ADW & Associates, LLC - Alisha Williams *2015		Business Analyst I	02/20/2015	\$1.00	\$1.00	\$0.00	\$0.00	\$2.00	Inactive	Edit Delete Comments

3 A page will load where comments can be viewed.

TA Staff Type Comments

TA Provider Name: ICF Incorporated

TA Staff Type: TBD-ABP Associates - Doe, Jane *2020

Effective Date: 01/01/2020

Status:	Updated Time:	Updated User:	Comments:
Approved	2020-10-20 17:20:37.0	Lauren s Deigh	Approved
Approved	2018-03-09 18:16:28.0	Christine W Brown	Rate and occupational types updated from TBD as per TA provider files received via WAG (9-10/2017)
Approved	2018-02-27 10:53:57.0	Christine W Brown	Rate and occupational types updated from TBD as per TA provider files received via WAG (9-10/2017)
Approved	2016-03-10 08:54:51.0	Richard Campbell	none

B6. HUD User | Access Review Staff Types

User Role: HUD User

Menu Options: Review Staff Types

Purpose: Allow HUD users to review staff types and rates.

Complete the following steps to add review staff types and rates:

- 1 Navigate to the **Administration** module and locate the **User Management** menu as described in Section A2 above. Select **<Review Staff Types>**. The **“Search Staff Rates to Approve”** page will load.

SEARCH STAFF RATES TO APPROVE

Staff Rates Approval

Search Criteria

TA Provider: Staff Rate Status: Rate Type: Occupational Type: Staff Type:



User Role: HUD User Menu Options: Review Staff Types

2 On the “Search Staff Rates to Approve” page, enter search criteria and select <Search>.

SEARCH STAFF RATES TO APPROVE
Staff Rates Approval

Search Criteria

TA Provider: Staff Rate Status: Rate Type: Occupational Type: Staff Type:

3 In the search results, choose the Staff Rate to be reviewed by checking the box in the “Select” column and then select <Review>. The “Review Comments” page will display.

STAFF TYPES
Review Staff Types
16 Record(s) Displaying 1 through 10

Select	TA Provider	Staff Type	Rate Type	OccupationalType	Effective Date	Base Rate(s)	Fringe Rate(s)	Overhead Rate (s)	GA Rate (s)	Total Rate(s)	Status	Action
<input type="checkbox"/>	Cloudburst Consulting Group	2020 MDG Associates	Contractor	Housing Specialist	04/06/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	Cloudburst Consulting Group	2020 MDG Associates	Contractor	Housing Specialist	04/06/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input checked="" type="checkbox"/>	Cloudburst Consulting Group	2020 MDG Associates - Project Assistant	Contractor	Housing Specialist	04/06/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	Cloudburst Consulting Group	2020 MDG Associates	Contractor	Housing Specialist	04/06/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	ICF Incorporated	ADW & Associates -	TBD	Business Analyst I	02/25/2016	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	ICF Incorporated	AUGTEST1	Staff	TBD	08/10/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	ICF Incorporated		Staff	Business Analyst I	03/14/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	Cloudburst Consulting Group	2020 Consultant - C	Staff	TBD	01/01/2013	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	Cloudburst Consulting Group	Consultant - C	Contractor	Auditor	01/01/2013	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents
<input type="checkbox"/>	Corporation for Supportive Housing	PROGRAM COORDINATOR	Staff	Administrative Specialist I	01/01/2020	\$1.00	\$1.00	\$1.00	\$1.00	\$4.00	Pending	View Approval Documents

4 On the “Review Comments” page, HUD users can enter comments and select <Approve>, <Reject>, or <Inactive> to approve the Staff Rate, reject the Staff Rate, or inactivate the Staff Rate.

Review Comments Close

Please enter review comments

Approve Reject Inactive

C. Manage TA Staff

The System allows authorized users of TA Providers (i.e., Grantee Users with the Staff Rate user role) to add, edit, and delete personnel associated with TA Staff Rates approved by HUD. These actions are completed using the <Manage TA Staff > link in the Administration module.



C1. TA Provider | Search Staff

Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role), as well as, CPD Representatives assigned to an award can search for staff associated with that award in DRGR.

User Role: Grantee Users	Menu Option: Manage TA Staff
--------------------------	-------------------------------------

Purpose: Allow TA Provider to search existing TA personnel

Complete the following steps to search existing TA Staff:

- 1 To search for a Staff Type, navigate to the **Administration** module and locate the **Staff Rates** menu. See A1 above. Select the **<Manage TA Staff>** link. (Note: If the user does not have the Staff Rate role, then the **<Manage TA Staff>** link is not available.) The **“Manage Staff”** page will load.
- 2 On the **“Manage Staff”** page, enter search criteria to access the desired Staff Type. See “Add Staff Field” table below for description of fields that can be searched. After desired fields are populated, choose **<Search>**. Search results will load.

STAFF
Manage Staff
Search Criteria

Staff Type:	Name:	Rate Type: <small>Select Option</small>	Occupational Type: <small>Select Option</small>
-------------	-------	--	--

- 3 In the search results, the user can sort the results using the headers for the search results.

STAFF
Manage Staff
Search Criteria

Staff Type:	Name:	Rate Type: <small>Select Option</small>	Occupational Type: <small>Select Option</small>
-------------	-------	--	--

251 Record(s) Displaying 1 through 10

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

Select	Staff Type	Rate Type	Occupational Type	Name	Status	Action
<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	John Dse	Active	Edit
<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	Lee X Turner	Active	Edit
<input type="checkbox"/>	Administrative Assistant II - 15495	Staff	Administrative Specialist I	Lynn Drew	Active	Edit
<input type="checkbox"/>	Analyst - 23132	Staff	Business Analyst I	Vincent Grady	Inactive	Edit
<input type="checkbox"/>	Analyst - 30234	Staff	Business Analyst I	Won Joon Kim	Active	Edit
<input type="checkbox"/>	Analyst 18770 *3/2014	Staff	Business Analyst I	Matthew Crews	Active	Edit
<input type="checkbox"/>	Analyst 19775 *3/2014	Staff	Business Analyst I	Bryan Smalley	Active	Edit
<input type="checkbox"/>	Analyst 20759 *3/2014	Staff	Business Analyst I	Kristen Aquilino	Active	Edit
<input type="checkbox"/>	Analyst 24581 *3/2014	Staff	Business Analyst I	Heidi Erm	Active	Edit
<input type="checkbox"/>	Analyst 25015 *3/2014	Staff	Business Analyst I	Sarah Bridger	Active	Edit



C2. TA Provider | Add Staff

Authorized Users of TA Providers (i.e, Grantee Users with the Staff Rate role) can add new personnel to DRGR.

PROGRAM PROCESS RECOMMENDATION: Staff can be added to rates only after the rates are approved by HUD. TA Providers must follow the HUD Wage Rate standards. These standards are available online at:
https://www.hud.gov/program_offices/comm_planning/about/cpdata/guidance.

User Role: Grantee User	Menu Option: Manage TA Staff																																																																													
Purpose: Allow TA Provider to add new staff.																																																																														
<input checked="" type="checkbox"/> Complete the following steps to add a new staff:																																																																														
1 To add staff, navigate to the Administration module, locate the Staff Rate menu. See A1 above. Select the <Manage TA Staff> link. (Note: If the user does not have the Staff Rate role, then the <Manage TA Staff > link is not available.) The “Manage Staff” page will load.																																																																														
2 On the “Manage Staff” page, select the <Add Staff > link. The “Add Staff” page will load.																																																																														
<div style="border: 1px solid #ccc; padding: 5px;"> <p>STAFF Manage Staff</p> <p>Search Criteria</p> <p>Staff Type: <input type="text"/> Name: <input type="text"/> Rate Type: <input type="text"/> Occupational Type: <input type="text"/></p> <p>251 Record(s) Displaying 1 through 10</p> <p>First Prev 1 2 3 4 5 6 7 8 9 10 Next Last</p> <p><input type="text" value="Search"/></p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Select</th> <th>Staff Type</th> <th>Rate Type</th> <th>Occupational Type</th> <th>Name</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Accountant Nzume, Cornelius 2019</td> <td>Staff</td> <td>Accountant</td> <td>John Doe</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Accountant Nzume, Cornelius 2019</td> <td>Staff</td> <td>Accountant</td> <td>Lee x Turner</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Administrative Assistant II - 15495</td> <td>Staff</td> <td>Administrative Specialist 1</td> <td>Lynn Drew</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst - 23132</td> <td>Staff</td> <td>Business Analyst I</td> <td>Vincent Grady</td> <td>Inactive</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst - 30134</td> <td>Staff</td> <td>Business Analyst I</td> <td>Won Joon Kim</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst 18770 *3/2014</td> <td>Staff</td> <td>Business Analyst I</td> <td>Matthew Crews</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst 19775 *3/2014</td> <td>Staff</td> <td>Business Analyst I</td> <td>Bryan Smalley</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst 20759 *3/2014</td> <td>Staff</td> <td>Business Analyst I</td> <td>Kristen Aquilino</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst 24381 *3/2014</td> <td>Staff</td> <td>Business Analyst I</td> <td>Heidi Erm</td> <td>Active</td> <td>Edit</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analyst 25015 *3/2014</td> <td>Staff</td> <td>Business Analyst I</td> <td>Sarah Bridger</td> <td>Active</td> <td>Edit</td> </tr> </tbody> </table> <p><input type="button" value="Add Staff"/> <input type="button" value="Delete"/></p> </div>		Select	Staff Type	Rate Type	Occupational Type	Name	Status	Action	<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	John Doe	Active	Edit	<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	Lee x Turner	Active	Edit	<input type="checkbox"/>	Administrative Assistant II - 15495	Staff	Administrative Specialist 1	Lynn Drew	Active	Edit	<input type="checkbox"/>	Analyst - 23132	Staff	Business Analyst I	Vincent Grady	Inactive	Edit	<input type="checkbox"/>	Analyst - 30134	Staff	Business Analyst I	Won Joon Kim	Active	Edit	<input type="checkbox"/>	Analyst 18770 *3/2014	Staff	Business Analyst I	Matthew Crews	Active	Edit	<input type="checkbox"/>	Analyst 19775 *3/2014	Staff	Business Analyst I	Bryan Smalley	Active	Edit	<input type="checkbox"/>	Analyst 20759 *3/2014	Staff	Business Analyst I	Kristen Aquilino	Active	Edit	<input type="checkbox"/>	Analyst 24381 *3/2014	Staff	Business Analyst I	Heidi Erm	Active	Edit	<input type="checkbox"/>	Analyst 25015 *3/2014	Staff	Business Analyst I	Sarah Bridger	Active	Edit
Select	Staff Type	Rate Type	Occupational Type	Name	Status	Action																																																																								
<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	John Doe	Active	Edit																																																																								
<input type="checkbox"/>	Accountant Nzume, Cornelius 2019	Staff	Accountant	Lee x Turner	Active	Edit																																																																								
<input type="checkbox"/>	Administrative Assistant II - 15495	Staff	Administrative Specialist 1	Lynn Drew	Active	Edit																																																																								
<input type="checkbox"/>	Analyst - 23132	Staff	Business Analyst I	Vincent Grady	Inactive	Edit																																																																								
<input type="checkbox"/>	Analyst - 30134	Staff	Business Analyst I	Won Joon Kim	Active	Edit																																																																								
<input type="checkbox"/>	Analyst 18770 *3/2014	Staff	Business Analyst I	Matthew Crews	Active	Edit																																																																								
<input type="checkbox"/>	Analyst 19775 *3/2014	Staff	Business Analyst I	Bryan Smalley	Active	Edit																																																																								
<input type="checkbox"/>	Analyst 20759 *3/2014	Staff	Business Analyst I	Kristen Aquilino	Active	Edit																																																																								
<input type="checkbox"/>	Analyst 24381 *3/2014	Staff	Business Analyst I	Heidi Erm	Active	Edit																																																																								
<input type="checkbox"/>	Analyst 25015 *3/2014	Staff	Business Analyst I	Sarah Bridger	Active	Edit																																																																								

The remainder of this page is intentionally left blank.



- 3 On the “Add Staff” page, complete all information marked with an asterisk. See “Add Staff Fields” table below for guidance on completing these fields.

ADD STAFF

* indicates required fields

*Is staff a current DRGR user: Yes No

*Select User:

*First Name:

Middle Initial:

*Last Name:

Title:

Organization:

*Staff Type:

*Status:

Save | Cancel

- 4 To save the new staff entry, select <Save>. Or to cancel the entry, select <Cancel> and return to the previous page.

ADD STAFF

* indicates required fields

*Is staff a current DRGR user: Yes No

*Select User:

*First Name:

Middle Initial:

*Last Name:

Title:

Organization:

*Staff Type:

*Status:

Save | Cancel



Add Staff Fields

All fields marked with an asterisk are required.

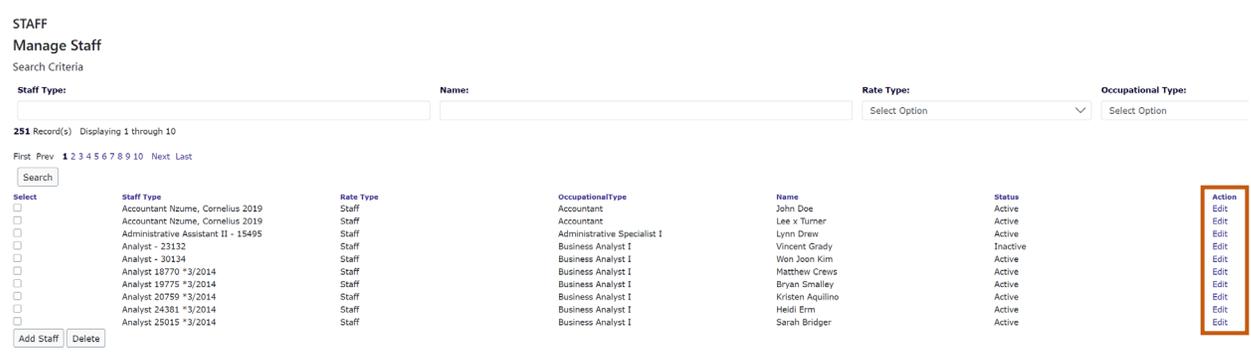
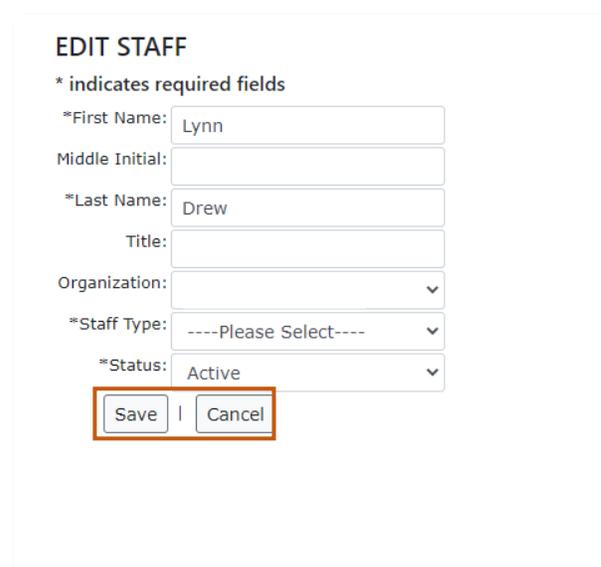
Field	Guidance
Is staff a current DRGR user? *	Select “Yes” or “No” to answer the question.
Select User*	Select the name of the DRGR user. If the staff person is not a DRGR user, the field is grayed-out.
First Name*	Enter the name of the staff person. If the staff person is a DRGR user and a name was selected from the “Select user” field, the person’s name is populated.
Middle Initial	Optional: Enter the name of the staff person. If the staff person is a DRGR user and a name was selected from the “Select user” field, the person’s name is populated.
Last Name*	Enter the name of the staff person. If the staff person is a DRGR user and a name was selected from the “Select user” field, the person’s name is populated.
Title	Optional: Enter the title of person.
Organization	Optional: Select the name of the organization for which the person works.
Staff Type*	Select the HUD approved rate associated with the person. NOTE: Do not change the associated rate for a person, unless there is an actual error. Any existing person who gets a new hourly rate should be added as a new person in DRGR.
Status*	Status defaults to “Active” but can be changed to “Inactive,” if the person and rate are no longer used under the TA award. Do not de-activate a person unless all reimbursement payments are complete, including indirect cost rate adjustments, and all associated TA work plans have a “Closed” status in DRGR.

C3. TA Provider | Edit Staff

Authorized users of TA Providers (i.e, Grantee Users with the Staff Rate role) can use the <Edit> option to correct mistakes or to change information requested by HUD. Note, however, that users should not change



the associated rate for a person unless there is an actual error. Any existing person who gets a new hourly rate should be added as a new person in DRGR.

User Role: Grantee User	Menu Option: Manage TA Staff
Purpose: Allow TA Provider to edit staff types.	
<input checked="" type="checkbox"/> Complete the following steps to edit an existing Staff Type:	
1 To edit a staff entry, follow the steps in Section C1 above to search for the staff.	
2 To edit information for existing personnel, select the <Edit> link under the Action column for the staff to be edited. The "Edit Staff" page will load.	
 <p>The screenshot shows the 'Manage Staff' interface. It includes search criteria for Staff Type, Name, Rate Type, and Occupational Type. Below the search bar, it displays 251 records. A table lists staff members with columns for Select, Staff Type, Rate Type, Occupational Type, Name, Status, and Action. The 'Action' column contains 'Edit' links for each staff member.</p>	
3 On the "Edit Staff" page, edit information as appropriate. Select <Save> to retain changes. Select <Cancel> to cancel the edits and return to previous page.	
 <p>The screenshot shows the 'EDIT STAFF' form. It includes fields for First Name (Lynn), Middle Initial, Last Name (Drew), Title, Organization, Staff Type (Please Select), and Status (Active). The 'Save' and 'Cancel' buttons are highlighted with a red box.</p>	



C4. TA Provider | Delete Staff

Authorized users of TA Providers (i.e., Grantee Users with Staff Rate role) can delete staff in DRGR. Note: Staff associated with TA work plans cannot be deleted; users may delete only those staff not associated with work plans.

User Role: Grantee User	Menu Option: Manage TA Staff
Purpose: Allow TA Provider to delete staff.	
<input checked="" type="checkbox"/> Complete the following steps to delete an existing staff:	
1 To delete Staff, follow the steps in Section C1 above to search for the Staff.	
2 In the search results, select the staff to be deleted under the “Select” column, and then select <Delete> under the search results.	
<p>The screenshot shows the 'Manage Staff' interface. At the top, there are search criteria fields for 'Staff Type', 'Name', 'Rate Type', and 'Occupational Type'. Below these is a table with 10 records. The first column is labeled 'Select' and contains checkboxes. The second column is 'Staff Type', the third is 'Rate Type', the fourth is 'Occupational Type', the fifth is 'Name', the sixth is 'Status', and the seventh is 'Action'. The 'Action' column contains 'Edit' links. At the bottom of the table, there are 'Add Staff' and 'Delete' buttons.</p>	

The remainder of this page is intentionally left blank.



User Role: Grantee User	Menu Option:  Manage TA Staff
<p>3 As noted, only staff that are not associated with an activity can be deleted. If the staff is not associated with an activity, then the success message below will load, and the staff entry will be deleted. If the staff is associated with an activity, then the user will receive the failed message below.</p> <p>SUCCESS MESSAGE:</p> <div data-bbox="298 552 812 714" style="border: 1px solid black; padding: 10px;"><p>STAFF Manage Staff Staff deleted successfully</p></div> <p>FAIL MESSAGE:</p> <div data-bbox="298 835 1002 1073" style="border: 1px solid black; padding: 10px;"><ul style="list-style-type: none">• Cannot delete Staff as it is associated with a Ta Activity<p>STAFF Manage Staff Search Criteria</p></div>	