Disaster Recovery Grant Reporting System

User Manual

U.S. Department of Housing and Urban Development

DRGR User Manual Version 3.0 – 11/2020; rev. 01/2021

About this Manual

This material is based upon work supported by funding under an award with the U.S. Department of Housing and Urban Development and is prepared by technical assistance providers. It is intended only to provide guidance. The contents of this document, except when based on statutory or regulatory authority or law, do not have the force and effect of law and are not meant to bind the public in any way. The substance and findings of the work are dedicated to the public and intended only to provide clarity to the public regarding existing requirements under the law or agency policies. Opinions expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, HUD or by any HUD program.

A Note to Users

Any or all uses of the DRGR System and all files on the DRGR System may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to an authorized site, HUD, and law enforcement personnel, as well as authorized officials of other agencies, both domestic and foreign. By using the DRGR System, the user consents to such interception, monitoring, recording, copying, auditing, inspection, and disclosure at the discretion of authorized site or HUD personnel.

Unauthorized or improper use of the DRGR System may result in administrative disciplinary action as well as civil and criminal penalties. By continuing to use the DRGR System, users indicate their awareness of, and consent to, these terms and conditions of use. If the user does not agree to the conditions stated in this warning, log off immediately.

Chapter 1: Get Started

Chapter 1: Get Started i

A. Background 1

B. Overview 1

B1. Organization of User Manual 1

B2. Key Programs and Terms 5

A. Background

The Disaster Recovery Grant Reporting (DRGR) System (DRGR or System) is a web-based system used to automate the management of program requirements and voucher payments issued by the Department of Housing and Urban Development (HUD). The System was initially created for HUD's Community Development Block Grant - Disaster Recovery (CDBG-DR) awards, but is now available for many other HUD programs, including those administered through both grants and cooperative agreements. See Section B3 for a list of programs managed in the DRGR System.

The System improves efficiency and data transparency by reducing the time between submission of program requirements and HUD approval of the submission. The System also offers a variety of reporting capabilities.

The DRGR System is available 24 hours a day and seven days a week. System maintenance occurs after advance notice is provided to all users.

B. Overview

This DRGR System User Manual is a technical guide for users to navigate the System and properly utilize the different components of the System. This User Manual is for both Grantee and HUD users of the DRGR System (collectively referred to as DRGR users). This Manual is not intended to address program-specific regulations or individual program business processes.

Additional technical resources related to the DRGR System are available online at https://www.hudexchange.info/DRGR.

B1. Organization of User Manual

The content of this User Manual is organized by chapters. Each chapter describes the technical aspects of the DRGR System. A summary of the chapters is provided in the table below.

Summary of DRGR User Manual Chapters and Applicable DRGR Modules

DRGR Module	User Manual Chapter
N/A	**Chapter 1: Get Started** Provides an overview of the User Manual and the technical aspects of the DRGR System.
N/A	**Chapter 2: Access and Navigate the System** Provides procedures to login, logout, and navigate the DRGR System.
Home	**Chapter 3: Home Page and Resources** Provides procedures to navigate the DRGR Home page, My Action Items, and My Announcements.

DRGR Module	User Manual Chapter
Manage My Grants	Chapter 4: Grants and Grantees Provides procedures to add and view Grants and Grantees.
Administration	Chapter 5: User Management and Certification Provides procedures to associate DRGR users to grants, (re)certify users, request new users, and manage existing user accounts, including user role management.
Administration	Chapter 6: Responsible Organizations Provides procedures to add and edit Responsible Organizations and Subordinate Organizations.
My Profile	Chapter 7: My Profile Provides procedures to manage your DRGR user account and subscriptions.
Administration	Chapter 8: Technical Assistance (TA) Staff and Rates Provides procedures to create, submit, and approve TA Personnel and Rates.
	Chapter 9: RESERVED
Manage My Grants	Chapter 10: Action Plan – Overview Provides procedures to add and edit Action Plans.
	Chapter 11: RESERVED
Manage My Grants	Chapter 12: Projects Provides procedures to add and edit Action Plan Projects.
Manage My Grants	Chapter 13: Programs Provides procedures to add and edit Action Plan Programs.
Manage My Grants	Chapter 14: Activities Provides procedures to add and edit Action Plan Activities.
Manage My Grants	Chapter 15: Action Plan – Review Tools Provides information on how to access the Action Plan Review Tools and its various features.
Manage My Grants	Chapter 16: Action Plan – Submission/Approval Provides procedures to submit, review, and approve the Action Plan.

DRGR Module	User Manual Chapter
Manage My Grants	Chapter 17: Technical Assistance (TA) Work Plan Provides procedures to add, edit, and submit TA Work Plans.
Manage My Grants	Chapter 18: HUD Technical Assistance (TA) Work Plan Approval Provides procedures to review and approve TA Work Plans.
Manage My Grants	Chapter 19: Performance Report – Overview Provides an overview of the Performance Report and its relationship with the Action Plan. This Chapter also provides procedures to add and edit performance reports.
Manage My Grants	Chapter 20: Performance Report – Addresses Provides procedures to add and edit Addresses.
Manage My Grants	Chapter 21: Performance Report – Review Tools Provides information on how to access the Performance Report Review Tools and its various features.
Manage My Grants	Chapter 22: Performance Report – Submission/Approval Provides procedures for Grantees to submit and HUD users to approve performance reports.
Manage My Financials	Chapter 23: Financial – Overview and Roles Provides an overview of the Financial Module and procedures to navigate financial functions within the DRGR System.
Manage My Financials	Chapter 24: Financial – Obligations and Vouchers Provides procedures to obligate funds to an activity and create, approve, and revise vouchers.
Manage My Financials	Chapter 25: Financial – Program Income Provides procedures to add and edit Program Income Accounts and Receipts.
Manage My Financials	Chapter 26: Financial – Activity Blocks and Returned Funds Provides procedures to block activities from drawdown and return funds to U.S. Treasury.
	Chapter 27 RESERVED.
Manage My Financials	Chapter 28: Financial – HUD Voucher Approval

DRGR Module	User Manual Chapter
	Provides procedures to approve Over Threshold Vouchers and TA Invoices.
Manage My Financials	Chapter 29: Financial – Voucher Supporting Documentation Provides procedures to add, edit, and submit supporting documents for Voucher Line Items.
Manage My Financials	Chapter 30: RESERVED
Manage My Grants	Chapter 31: Closeout Provides procedures to closeout a grant.
Manage My Compliance	Chapter 32: Compliance – Flags Provides procedures to remediate and resolve DRGR Flags.
Manage My Compliance	Chapter 33: Compliance – Monitoring/Audit/Technical Assistance Events Provides procedures to add and edit Monitoring, Technical Assistance (TA), and Audit Events.
Administration	Chapter 34: Data Uploads Provides procedures to upload data in-lieu of entering data manually on DRGR System pages.
Data Analytics	Chapter 35: Reports Provides procedures to access, customize, and download MicroStrategy Reports.
Data Analytics	Chapter 36: Public Data Portal Provides procedures to access reports on the DRGR Public Data Portal.
N/A	Chapter 37: HUD Admin and Superuser Provides procedures to manage the DRGR System and user accounts at HUD Headquarters.

Throughout this Manual, callout boxes with the word “Note” or “Tip” written in the header highlight important information about using the System.

This Manual also has callout boxes that include “Program Process Recommendations.” These captions highlight functionality within the System that is used differently depending on the HUD program.

Examples of these types of callout boxes are below:

CALL OUT BOX TYPE	EXAMPLE
Tips and Notes	TIP! The DRGR Action Plan is typically completed by Grantees after approval of their Published Plan and execution of the Grant Agreement.
Program Process Recommendations	PROGRAM PROCESS RECOMMENDATION: MID Budgets are required by the CDBG-DR program. This field should not be completed for other grants.

B2. Key Programs and Terms

The following table provides a list of CPD programs that utilize the DRGR System.

Key Programs

Acronym	Program
CDBG-DR	Community Development Block Grant – Disaster Recovery
NSP	Neighborhood Stabilization Program
PFS	HUD Pay for Success
RCB	Rural Capacity Building for Community Development and Affordable Housing Program
RHP	Recovery Housing Program
Section 4	Capacity Building for Affordable Housing and Community Development Program (also known as Section 4 of the HUD Demonstration Act of 1993)
SHOP	Self-Help Homeownership Program
TA	Community Compass Technical Assistance

VHRMP	Veterans Housing Rehabilitation and Modification Pilot Program

The following "Key Terms" table provides a list of terms and acronyms used throughout the DRGR User Manual.

Key Terms

Acronym / Term	Definition
Action Plan	A comprehensive description of projects, including activities, accomplishments, sources of funds, and users of funding.
Activity	A specific project addressing a need, which is performed and reported by the Grantee.
Collection	Funds returned by a Grantee due to overpayment of some kind.
CPD	Community Planning and Development
CM	Configuration Management
DBA	Database Administrator
FEMA	Federal Emergency Management Agency
Field Office	HUD Field Office staff members are responsible for reviewing and approving the Action Plan and QPRs and providing Technical Assistance to Grantees.
Firewall	Safety feature implemented to protect internal networks connected to the Internet. The firewall restricts outside user's access of internal network resources.
GUI	Graphical User Interface: A generic name for any human computer interface that substitutes graphic menus, activated by keyboard/mouse, for characters (i.e. MS Windows desktop manager).
GMP	The DRGR module for HUD to document oversight and monitoring events. The GMP module is not covered in this Manual.
Grants Management Portal (GM Portal)	A single login page available for all users of CPD grant management systems to navigate between the systems quickly. The login page is accessed at https://cpd.hud.gov/gmportal/.
Grant	A financial award issued by HUD to carry out an approved project or activity. References to "Grant" include cooperative funding agreements.
Grantee	A classification used in DRGR to identify a non-HUD entity.

Acronym / Term	Definition
HTML	Hypertext Markup Language
HUD	U.S. Department of Housing and Urban Development
HTTP	Hypertext Transfer Protocol: The communication protocol utilized for communication between the Web Server and the Browser.
ISP	Internet Service Provider: A vendor who provides direct access to the Internet, email, and FTP.
LAN	Local Area Network: A short distance data communications network (typically within a building or campus) used to link computers and peripheral devices (such as printers, CD-ROMs, and modems) under some form of standard control.
Line of Credit Control System (LOCCS)	HUD's primary grant disbursement system, handling disbursements for the majority of HUD programs.
Monitoring/TA	DRGR functions for Grantees to document oversight and monitoring events.
Obligation	An action in DRGR's Manage My Financials module to evidence incurred costs and allow funding of such commitments through the creation of vouchers.
Payment	A disbursement of funds to the Grantee to carry out an approved project or activity.
POC	Points of Contact
QPR	Quarterly Performance Report: A report from the Grantee which depicts the progress toward recovery activities.
Performance Review	Review of the performance report submitted by the Grantee and conducted by Disaster Recovery Management at HUD.
SMTP	Simple Mail Transfer Protocol
SQA	Software Quality Assurance
SA	System Administrator
TA	Technical Assistance (usually used in DRGR functions used by TA Providers). Grantees see Monitoring/TA.
TA Provider	A type of Grantee in DRGR. TA Providers use the TA functions in DRGR; these functions are not used by other Grantee types.

Acronym / Term	Definition
TCP/IP	Transmission Control Protocol/Internet Protocol: Two popular protocols that provide communication across interconnected networks between computers with diverse hardware architectures and various operating systems.
UITP	Unit and Integration Test Plan
WAN	Wide Area Network: A data network typically extending a LAN (local area network) outside the building, over telephone common carrier lines to link to other LANs in remote buildings in possibly remote cities. The WAN uses common-carrier lines. The jump between a LAN and a WAN is made through a bridge/router.
TA Work Plan	A plan to implement technical assistance. The TA Work Plan in DRGR is used only by users associated with TA Providers.
Voucher	A request for payment. The Voucher in the DRGR System replaces the Standard Form (SF) 270 and (SF) 271.
Workstation	A personal computer connected to the LAN.

Chapter 2: Access and Navigate the System

Chapter 2: Access and Navigate the System 1

A. Hardware Requirements 1

B. Internet Access and Browsers 1

C. Login to the DRGR System 1

C1. User Account 1

C2. Access the DRGR System 2

C3. User IDs and Passwords 2

C4. Login to the DRGR System 3

C5. Troubleshoot Login to the DRGR System 5

C6. Logout of the DRGR System 6

D. DRGR Basic Navigation and System Modules 7

D1. DRGR Navigation Bar 7

D2. Grantee | Basic Navigation 8

D3. HUD | Basic Navigation 12

E. Summary of DRGR System Workflow 15

E1. DRGR Action Plans and Work Plans 16

E2. DRGR Drawdown and Invoice 17

E3. DRGR Performance Reports 17

Chapter 2: Access and Navigate the System

This Chapter contains procedures to access the DRGR System. In addition, it provides basic navigation instructions and information on each DRGR System module.

A. Hardware Requirements

The DRGR System is functional on both personal computers running on a Windows operating system and Apple Macintosh computers.

B. Internet Access and Browsers

An internet connection and an internet browser are required to access the DRGR System. A high-speed connection is recommended but not required. Google Chrome (47.x and later), Microsoft Edge (3.5 and higher), and Mozilla Firefox are recommended internet browsers. While most DRGR System functions work in Microsoft Internet Explorer version 11, some DRGR System functions do not work. All browsers must disable the pop-up blocker feature for drgr.hud.gov.

No other software is needed to use the DRGR System. However, some DRGR reports export to PDF. To open and save PDF documents, a free version of Adobe Reader is available for download at this website: https://get.adobe.com/reader.

C. Login to the DRGR System

C1. User Account

Access to the DRGR System is available to authenticated users. To become an authenticated Grantee user, a user account request is both submitted in the DRGR System by an existing, authenticated user with the user account request role and approved by a HUD Administrator in DRGR. User accounts are associated with a single Grantee profile in the DRGR System. For HUD users, a supervisor must submit a user account request via HUD's DIAMS, and then a HUD Administrator approves in DRGR. The details of the account access process are simple and included in Chapter 5 of this Manual. After the user account is approved by HUD, the login ID and password is used to log into the DRGR System.

TIP!

Each Grantee profile is associated with a Grantee type (TA provider and non-TA providers). To access both TA provider and non-TA provider features in DRGR, a user must have multiple profiles. Profiles are added to User Requests. See Chapter 5 – User Management and Certifications for more information.

C2. Access the DRGR System

Depending on the user, a few options are available to access the DRGR System. The first System access option is most familiar to most users. The second System access option is HUD's Grant Management Portal (GM Portal) and includes a single landing page for users with access to multiple HUD systems. Users can also access MicroStrategy directly from the GM Portal, without navigating through the DRGR System.

- Option 1: https://drgr.hud.gov/DRGRWeb
- Option 2: https://drgr.hud.gov/GMPortal

For HUD users, the DRGR System is part of HUD's single sign on system. This means HUD users logged into HUD's VPN can access the System and bypass the login page. The single sign on web address for the DRGR System is https://drgr.hud.gov/ssoDRGR.

TIP! Users may perform an internet search for "DRGR Login" to easily access the login page. Remember that DRGR works optimally in Google Chrome. Bookmarking the site is a helpful way to quickly access DRGR, but be sure to update bookmarks after each DRGR release to ensure smooth access.

C3. User IDs and Passwords

Each DRGR User needs a User ID and a password to login to the DRGR System. The following is a list of DRGR Login requirements and conditions:

Type	Requirements and Conditions
User ID	The User ID is the user's "C," "B," or "H" number, which is assigned by HUD IT Security and communicated by the HUD Admin of the DRGR System.
Password	Grantee users receive a temporary password from the HQ Admin, along with the User ID. Following initial login, the DRGR System requires users to create a new password. Passwords in the DRGR System must meet all of the following standards: • At least eight characters long. • Contain one upper case letter. • Contain one lower case letter. • Contain one number. Passwords may contain special characters when other conditions are met. The System requires users to change their login password every six (6) months. HUD Users do not manage User IDs and passwords in the DRGR System directly. Rather, the User IDs and passwords used to log onto to HUD's network are also used for the DRGR System.
Note	• All existing users can call HUD's HITS National Help Desk at 888-297-8689, option 9, to reset forgotten passwords only. • All existing users can email DRGRHelp@hud.gov to retrieve log in IDs for DRGR and the five-digit PIN required for the HITS National Help Desk. See addition troubleshooting tips in section C5 below.

C4. Login to the DRGR System

The following steps should be used to login into the DRGR System.

User Role: Grantee Users and HUD Users	**Menu Option:** N/A
Purpose: Allow Grantee Users and HUD Users to access the DRGR System.	

Complete the following steps to access the DRGR System:

1 Access the DRGR System using an internet browser and one of the following options:

→ https://drgr.hud.gov/DRGRWeb

→ https://drgr.hud.gov/GMPortal

→ https://drgr.hud.gov/ssoDRGR (permitted for HUD Users within HUD VPN; the next two steps do not apply if this option is used)

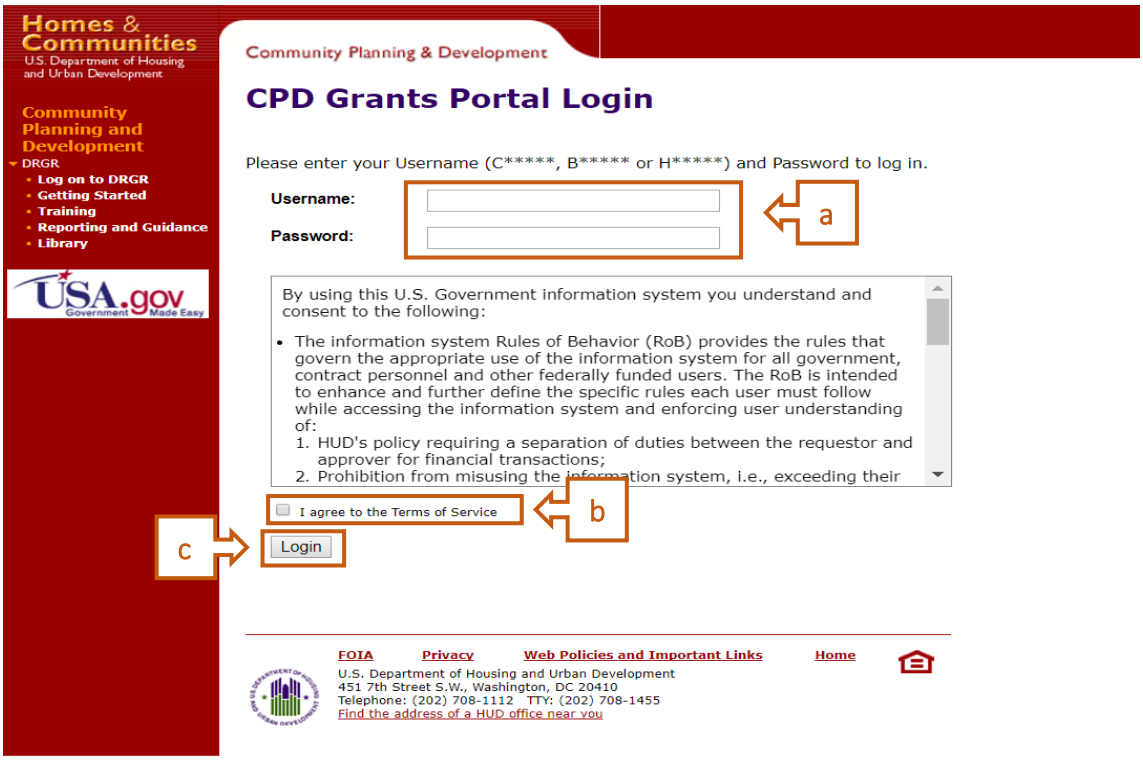
DRGR works optimally in Google Chrome. See *C.2 Access the DRGR System* above for details.

2 Complete the following actions on the login page:

a. Add the User ID to the "Username" field and add the password to the "Password" field. The password is case sensitive.

b. Select the **<I agree to the Terms of Service>** radio button. DRGR users cannot access the DRGR System until they agree to the "Terms of Service."

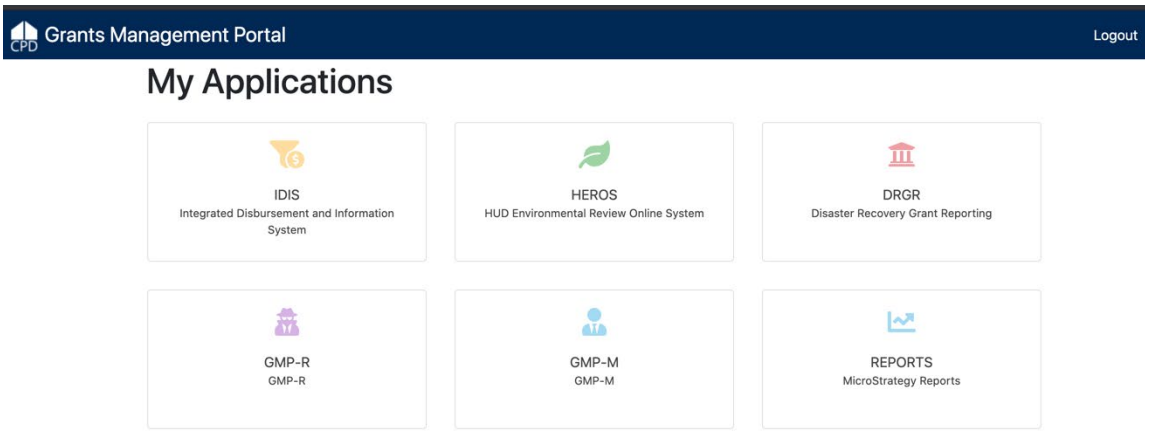
c. Select the **<Login>** button. If the login attempt is successful, a new page will load.



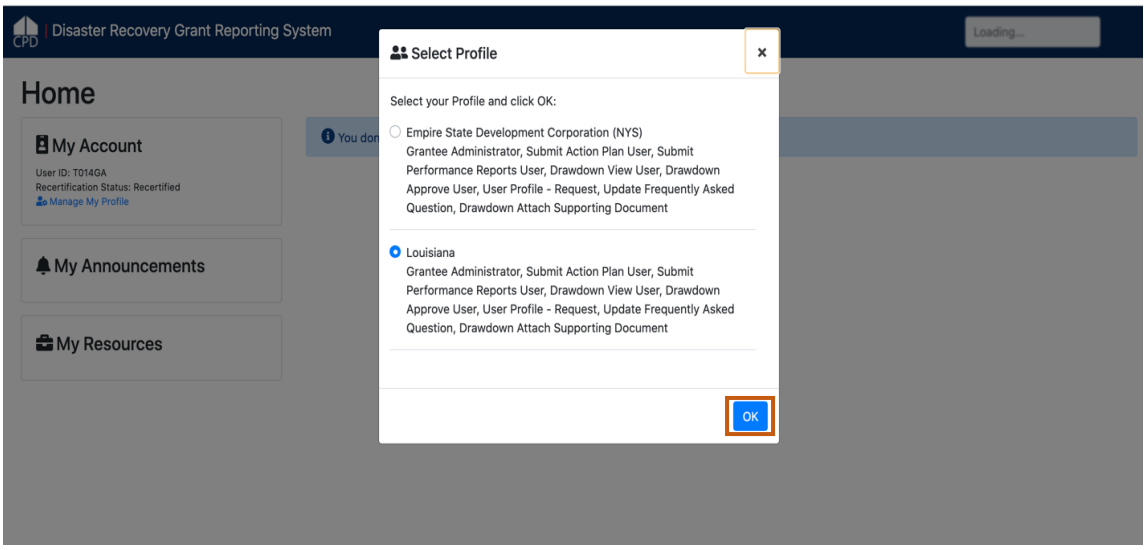
User Role: Grantee Users and HUD Users	**Menu Option:** N/A

3 NOTE: If accessing DRGR through the **<GM Portal>** link, all CPD systems that the logged-in user is authorized to access are displayed in tiles in the GM Portal. Users can click on each tile and access the selected CPD system. Select DRGR to continue.

Grant Management Portal

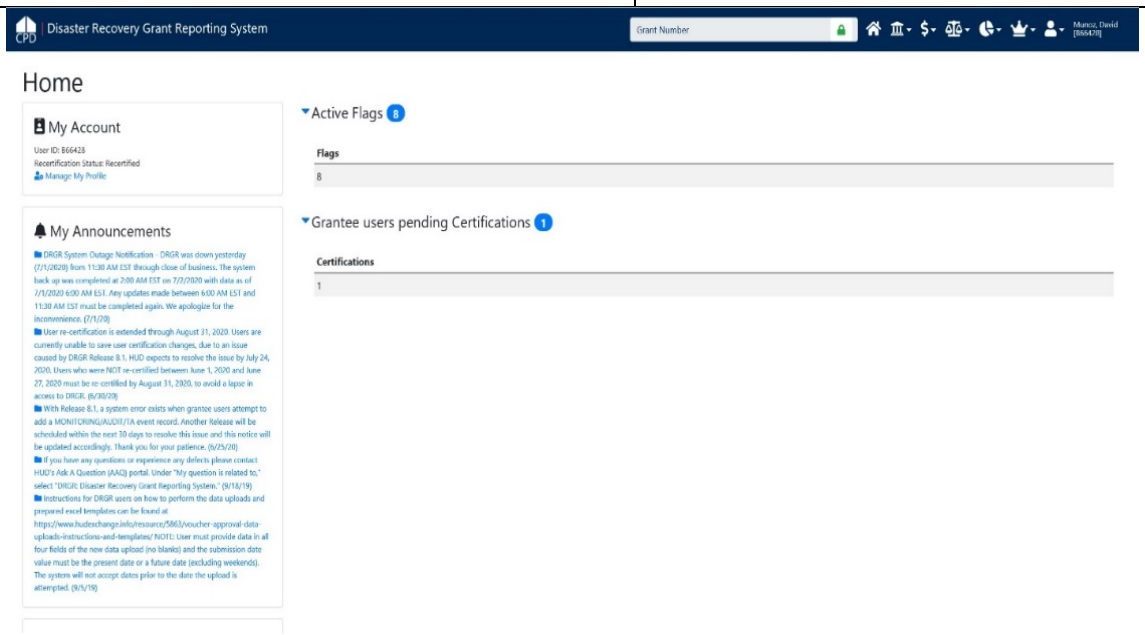


3 For users with more than one User Profile, the **"Select Profile"** page will be displayed. Select the radio button next to the desired profile followed by **<OK>**.



4 For users with a single User Profile, the **"Home"** page will display. See applicable screenshot below.

User Role: Grantee Users and HUD Users	**Menu Option:** N/A



C5. Troubleshoot Login to the DRGR System

The following instances will prevent users from accessing the DRGR System. Procedures to remedy each instance is described.

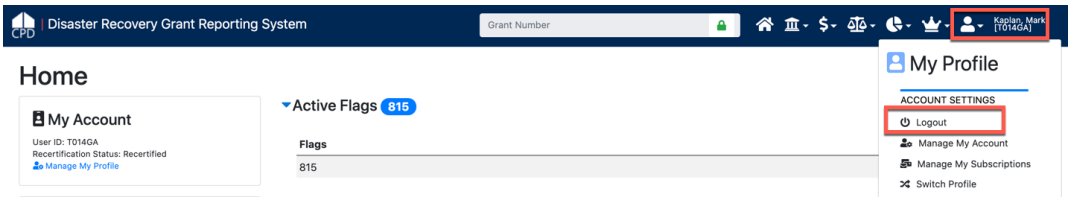
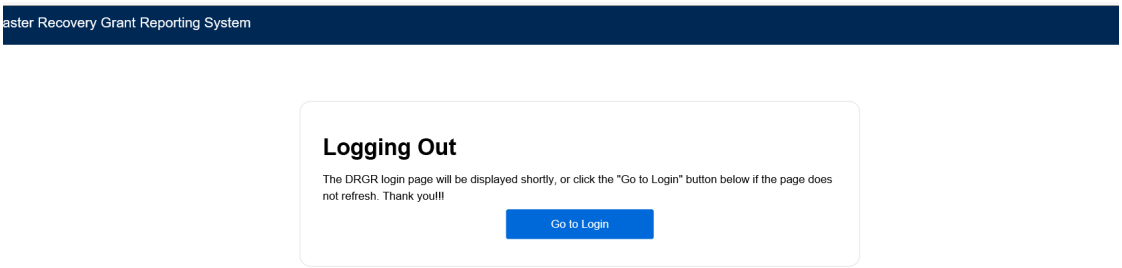
- **Password Resets.** The DRGR System allows three login attempts. After the third failed login attempt, the DRGR System locks out the user, preventing access even with the correct password. If a user experiences an issue with their login or password, call the HUD Help Desk at 1-888-297-8689 (Option 9).
- **Inactive Accounts.** Users that have not accessed the System for more than 60 days are automatically deemed inactive by the DRGR System. In these instances, their User IDs must be re-activated by the HQ Admin. Users that need to have their account reactivated should contact the DRGR user that is responsible for managing existing user accounts.
- **Session Resets.** The DRGR System disables access for 30 minutes, if a user improperly logs out of DRGR and then immediately attempts to access the System. This is in place to as a HUD IT security measure. Users who need to log into the System before 30 minutes has lapsed must email DRGRHelp@hud.gov, enter "Session Reset" in the subject line, and include the user ID in the body of the email message.
- **Five-Digit PIN**. The DRGR System requires each user to provide a five-digit personal identification number (PIN) at the time of account setup. This PIN is used by the HUD HITS Help Desk to reset password. Users who forget his/her PIN can email DRGRHelp@hud.gov to retrieve or reset the PIN.

- **Certifications.** Every DRGR User Account must be recertified by January 1 and July 1 of each year. If a user is not certified by the recertification deadline, they will be unable to access the DRGR System until they are recertified. Users that need to be recertified should contact their DRGR Administrator. Administrators may begin recertifications in December and June of each year.

TIPS!

- Navigate using DRGR links, rather than the Internet browser buttons.
- Do not use the BACK button in the Internet browser.
- Logout using the <Logout> link in My Profile. Do not simply close the window.
- Save early, save often! The DRGR System times out after 20 minutes of inactivity.
- To copy/paste text into DRGR, do so from WordPad or a file in .txt format.

C6. Logout of the DRGR System

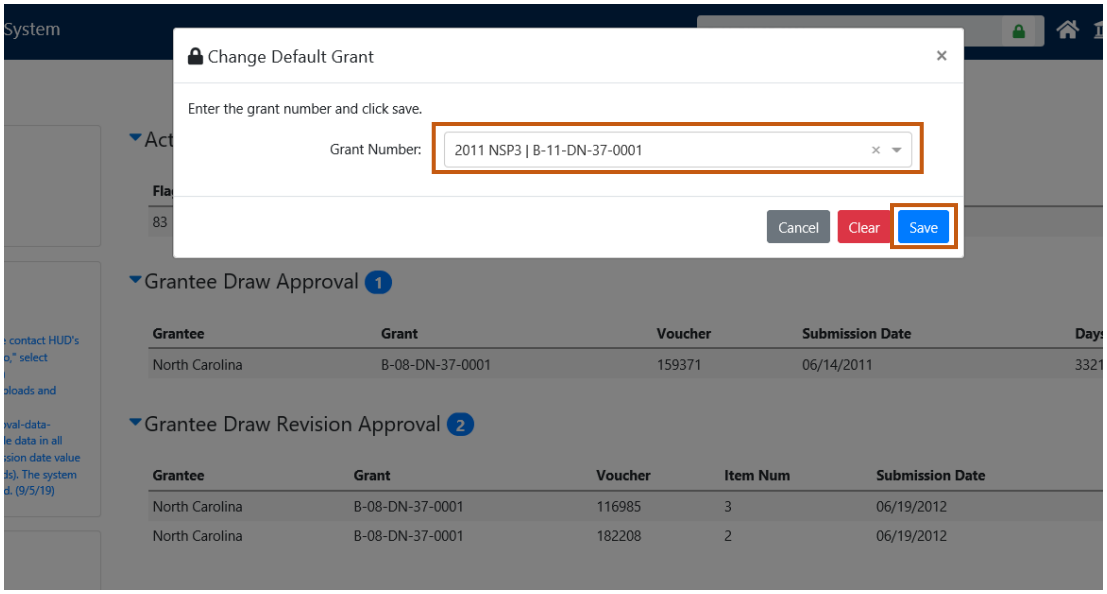
User Role: Grantee Users and HUD Users	**Menu Option:** Logout
Purpose: Allow Grantee Users and HUD Users to logout of the DRGR System.	
Complete the following steps to logout of the DRGR System:	
1 In the DRGR System, select **My Profile**, or icon, located in the navigation bar. This opens the dropdown menu for the **My Profile** module. Select the **<Logout>** option. 	
3 The following message will be displayed upon successful logout. 	

D. DRGR Basic Navigation and System Modules

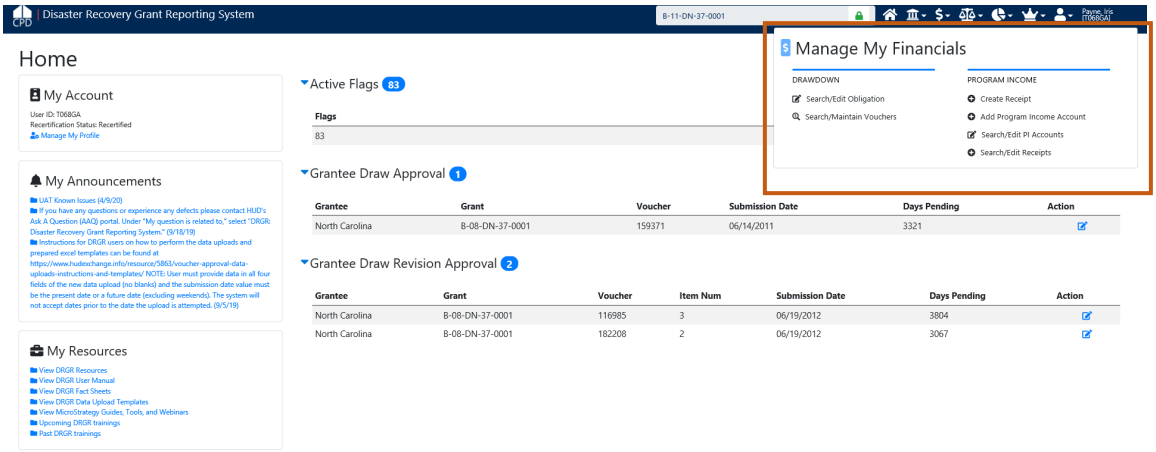
D1. DRGR Navigation Bar

This section provides the basic navigation of the DRGR System modules after login. The DRGR System contains seven modules that can be accessed via the Navigation Bar at the top of the page.

The Navigation Bar also contains the "Select Grant," also referred to as the "Locked Grant" feature. Most results returned for each module are dependent on this grant, however, some functions offer global searches that are not dependent on the selected grant. The DRGR System automatically defaults to the most recently awarded grant.

User Role: Grantee Users and HUD Users	**Menu Option:** N/A
Purpose: Allow Grantee Users and HUD Users to select a Grant and navigate the DRGR System.	
✓ Complete the following steps to logout of the DRGR System:	
1 To select a Grant to work in across the modules, select the Grant Number in the Navigation Bar.	
2 The **"Select Grant"** page will load. Select the desired Grant from the dropdown menu and select **<Save>.** 	

3 To navigate to a DRGR module, select one of the icons in the Navigation Bar. A menu of options unique to the selected DRGR module will appear. Select the desired action and a new page will load.



D2. Grantee | Basic Navigation

The following tables show the menu options available to DRGR Grantee Users and a brief description of each option. Some menu options are dependent on user roles and permissions (see DRGR User Manual Chapter 5).

Grantee Menu Options

Module	Menu	Submenu Options	Description
Manage My Grants	Action Plans	Add Action Plan	Add a new Action Plan in DRGR
		Manage Action Plan	Edit an existing Action Plan
		View Action Plan	View an existing Action Plan
		Download Action Plan	Download Action Plan PDF
		Search Action Plans	Search for Action Plans in DRGR
		Review Tools	Access Action Plan Review Tools
		Lookup Consolidated Plans	Lookup Consolidated Plans in DRGR

Module	Menu	Submenu Options	Description
Manage My Grants	Projects	Add Project	Add a new Project to the Action Plan
		Search Projects	Search for existing Projects
Manage My Grants	Activities	Add Activity	Add a new Activity to the Action Plan
		Search Activities	Search for existing Activities
		Restore Activities	Restore Activities that were previously deleted
Manage My Grants	Grantee Programs	Add Grantee Program	Add a new Program to the Action Plan
		Search Grantee Programs	Search for existing Programs
Manage My Grants	Performance Reports	Manage Performance Report	View, edit, and submit Quarterly Performance Reports
		Search Performance Reports	Search for Quarterly Performance Reports
		Manage Addresses	Add Addresses to a Quarterly Performance Report
Manage My Grants	Grants	Closeout Grant	Initiate and submit closeout of a Grant
		View Grant	View existing Grants
		Search Grants	Search existing Grants
Manage My Grants	Work Plans	Add Work Plan	Add a work plan to an Action Plan (TA Only)
		Search/Edit Work Plan	Search for and edit existing work plans (TA Only)
		Upload Work Plan	Upload work plan data directly to DRGR

Module	Menu	Submenu Options	Description
Manage My Financials	Drawdown	Search/Edit Obligation	Search and edit Activity Obligations
		Create a Voucher	Create a Voucher
		Search/Maintain Vouchers	Search existing Vouchers to view, approve/reject, or revise
Manage My Financials	Program Income	Create Receipt	Create Program Income Receipts
		Add Program Income Account	Create Program Income Accounts
		Search/Edit PI Accounts	Search and edit existing Program Income Accounts
		Search/Edit Receipts	Search and edit existing Program Income Receipts
Manage My Financials	Invoice	Add Invoice	Create Invoices
		Search/Edit Invoices	Search and Edit Existing Invoices
Manage My Compliance	Manage Flags	Search Flags	View and remediate or resolve existing Flags
Manage My Compliance	Monitoring / Audit / TA Events	Add Event	Add a new Monitoring/Audit/TA Event
		Search Events	Search and edit existing Monitoring/Audit/TA Events
		Search Event Topics	Search and edit existing Event Topics
Data Analytics	Analytics	Reports	Access MicroStrategy Reports
		Public Data Portal	Access the DRGR Public Data Portal

Module	Menu	Submenu Options	Description
Administration	User Management	Associate Users to Grants	Grant DRGR Users permission to view and/or edit selected Grant(s)
		Certify Grantee Users	(Re)certify DRGR Users
		Request New Users	Request a New User be granted a DRGR User Account and/or Profile
		Manage Existing Users	Request edits to an existing DRGR User Profile
		Upload User Requests	Upload DRGR User data directly into DRGR
Administration	Staff Rates	Manage Staff Types	Enter data on personnel types and rates
		Manage TA Staff	Enter personnel data
		Upload Staff Data	Upload Staff Data directly into DRGR
Administration	Manage Grantees	Add Responsible Organizations	Add Responsible Organizations
		Search Responsible Organizations	Search and edit existing Responsible Organizations
		Upload Responsible Organizations	Upload Responsible Organization data directly into DRGR
Administration	Utilities	Upload	Upload multiple types of data directly into DRGR
		FAQs	View and search Frequently Asked Questions
My Profile	Account Settings	Logout	Logout of the DRGR System
		Manage My Account	View and edit user account information
		Manage My Subscriptions	View and Edit email subscriptions
		Switch Profile	Switch to another Grantee Profile

D3. HUD | Basic Navigation

The following tables show the menu options available to DRGR HUD Users and a brief description of each option. Some menu options are dependent on user roles and permissions (see DRGR User Manual Chapter 5). Contact DRGRHelp@hud.gov if a menu option is missing.

HUD Menu

Module	Menu	Submenu Options	Description
Manage My Grants	Action Plans	Manage Action Plan	Edit an existing Action Plan
		View Action Plan	View an existing Action Plan
		Download Action Plan	Download Action Plan PDF
		Review Action Plan	Review a submitted Action Plan
		Search Action Plans	Search for Action Plans in DRGR
		Review Tools	Access Action Plan Review Tools
		Lookup Consolidated Plans	Lookup Consolidated Plans in DRGR
Manage My Grants	Projects	Search Projects	Search for Grantee Projects
	Activities	Search Activities	Search for Grantee Activities
	Grantee Programs	Search Grantee Programs	Search for Grantee Programs
Manage My Grants	Performance Reports	Manage Performance Report	Create and Edit Grantee Performance Reports
		Review Performance Report	Review Grantee Performance Reports
		Search Performance Reports	Search Grantee Performance Reports
Manage My Grants	Grants	View Grant	View existing Grants
		Search Grants	Search existing Grants
	Work Plans	Search/Review Work Plan	Search and review Grantee Workplans

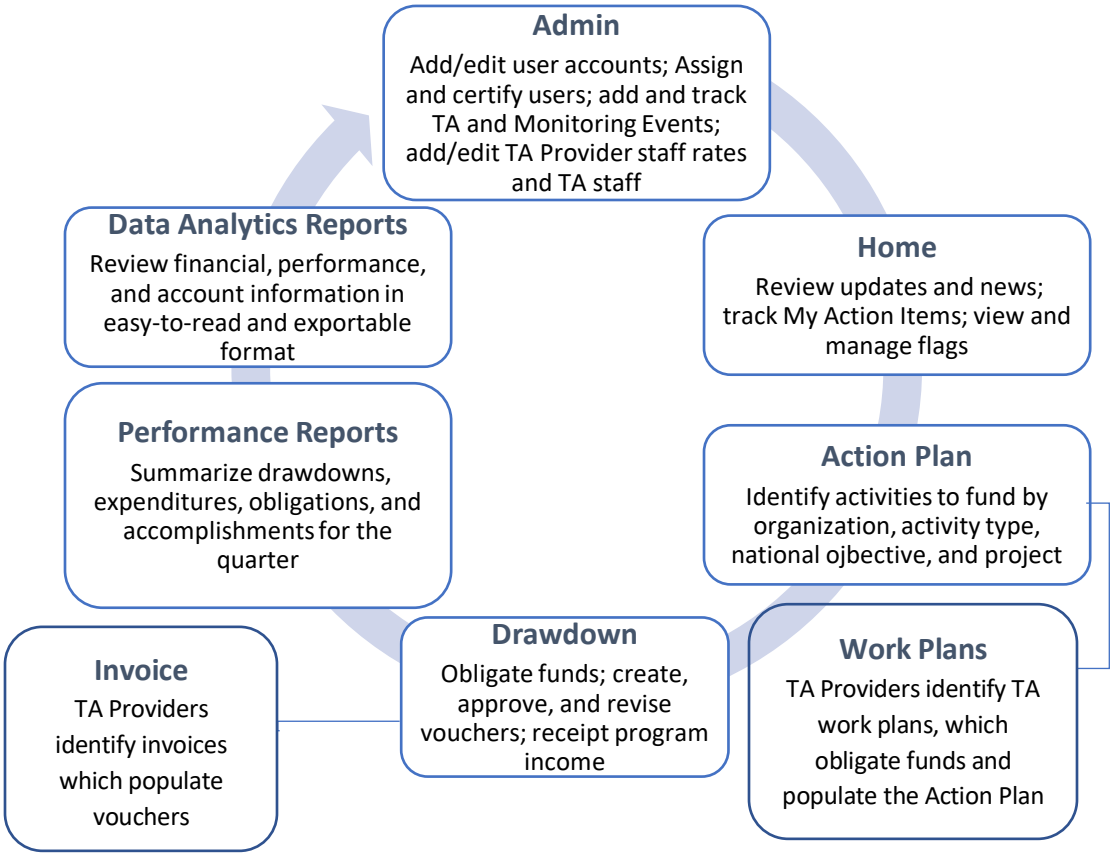
Manage My Grants			
Manage My Financials	Drawdown	Search/View Obligation	Search and view Grantee Obligations
		Search/Maintain Vouchers	Search Grantee Vouchers
		Search/View Invoices	Search, view, and approve/reject Grantee Invoices
		Add Document Review	Add a Document Review Event
		Search Document Review	Search and edit existing Document Review Events
Manage My Financials	Program Income	Search/View PI Accounts	Search and view Grantee Program Income Accounts
		Search/View Receipts	Search and view Grantee Program Income Receipts
Manage My Compliance	Manage Flags	Search Flags	Search and View Grantee Flags and Remediation Comments
Manage My Compliance	Monitoring / Audit / TA Events	Add Event	Add a new Monitoring/Audit/TA Event
		Search Events	Search and edit existing Monitoring/Audit/TA Events
		Search Event Topics	Search and edit existing Event Topics
	Analytics	Reports	Access MicroStrategy Reports

Data Analytics		Public Data Portal	Access the DRGR Public Data Portal
Administration	User Management	Certify Grantee Admin Users	Review and approve Grantee Administrators requests; (re)certify Grantee Administrators
		Certify Grantee Users	Review and approve Grantee User requests; (re)certify Grantee Users
		Certify HUD Office Users	(Re)certify HUD Office Users
		Request New Users	Request a New User be granted a DRGR User Account and/or Profile
		Manage Existing Users	Request edits to an existing DRGR User Profile
		Review Staff Types	Used to review staff types
		Upload User Requests	Upload DRGR User data directly into DRGR
		Upload Staff Data	Upload DRGR Staff Data directly into DRGR
Administration	Manage Grantees	Search Grantees	Search for existing Grantees
		Search/View Responsible Organizations	Search and view Grantee Responsible Organizations
Administration	Utilities	Upload	Upload multiple types of data directly into DRGR
		FAQs	View and search Frequently Asked Questions
My Profile	Account Settings	Logout	Logout of the DRGR System
		Manage My Account	View user account information
		Manage My Subscriptions	View and Edit email subscriptions
		Switch Profile	Switch to another Grantee Profile

E. Summary of DRGR System Workflow

The dropdown menus for each DRGR module vary depending on the user's role and privileges. The following figure depicts the typical DRGR System workflow. Work Plans, Personnel (Staff) Rates, and Invoices apply to TA Providers only. The sections below provide an introductory overview of the typical workflow for Action Plans, Financials, and Performance Reports, which are the modules where the majority of implementation activity occurs in the System. Information on these functions is outlined in detail in the applicable sections of the DRGR User Manual.

DRGR System Workflow



E1. DRGR Action Plans and Work Plans

To enter an Action Plan or a TA Work Plan in the DRGR System, the following key steps must occur:

Step	Entity Responsible	Task
1	HUD	HUD Headquarters (HQ) staff add Grant and Grantee Profiles to the DRGR System.
2	HUD	HUD Office of the Chief Financial Officer (CFO) staff add account information after the Grant Agreement is fully executed from HUD's Line of Credit Control System (LOCCS).
3	Grantee	Grantee submits request for user accounts with appropriate user roles to CPD field staff in DRGR via the **Administration** module.
4	Grantee	After DRGR user accounts have been created, DRGR Grantee Administrators authorize access to DRGR Grantee User accounts in DRGR via the **Administration** module.
5	Grantee	DRGR Grantee Users (not associated with a TA Provider) create an Action Plan in DRGR via the **Manage My Grants** module by: • Entering overall narratives. • Entering projects to group activities. • Entering programs to group activities. • Entering activities with budgets, performance measures, and assigning said activities to the appropriate project.
6	Grantee	Grantee submits Action Plan in the DRGR System once completed. Grantee will repeat step 5 (above) when new activities must be added, or changes need to be made to existing activities.
7	HUD	HUD staff reviews the DRGR Action Plan. If edits are needed, HUD staff can reject the Action Plan, returning the Action Plan to the Grantee to be revised and resubmitted. Otherwise, HUD staff approve the Action Plan.
8	TA Provider	Upon HUD setup of the DRGR Action Plan, TA Providers create and submit TA Staff Rates for HUD approval. TA Providers also assign staff and other personnel to approve rates.
9	TA Provider	Upon HUD approval of the TA Staff Rates, TA Providers create and submit TA Work Plans for HUD approval. TA Work Plans approved by HUD will automatically populate the Action Plan.

E2. DRGR Drawdown and Invoice

Upon HUD approval of the DRGR Action Plan, authorized Grantee Users can obligate funds to activities as well as create and approve vouchers in DRGR via the **Manage My Financials** module. TA Providers are not required to manually obligate funds by activity; funds are automatically obligated based on HUD approval of TA Work Plans.

Step	Entity Responsible	Task
1	**Grantee**	Grantee obligates funds to activities.
2	**Grantee**	Authorized Grantee Users create voucher or invoice in DRGR.
3	**Grantee**	Authorized Grantee Users review and approve voucher or invoice in DRGR.
4	**HUD**	If a voucher line item exceeds the drawdown threshold, it is forwarded to HUD for approval before being submitted to LOCCS.

E3. DRGR Performance Reports

The DRGR System automatically includes any activities in the DRGR performance reports if any funds were drawn down or obligated for those activities during the reporting period. To enter performance report data into DRGR via the **Manage My Grants** module, the following key steps must occur:

Step	Entity Responsible	Task
1	**Grantee**	Grantee adds the performance report for the upcoming due date if the DRGR System did not create the performance report automatically.
2	**Grantee**	Grantee enters progress narrative information to describe accomplishments across programs and projects.
3	**Grantee**	Grantee enters SF-425 Grant-level financial information, if necessary.
4	**Grantee**	Grantee enters information on activities with activity progress narratives, addresses assisted (if applicable), performance accomplishments, and financial updates.
5	**Grantee**	Authorized Grantee User submits performance report in DRGR once completed in accordance with the appropriation deadline. QPR submissions are typically due within 30 days after the end of each quarter but check program requirements for specific due dates.
6	**HUD**	HUD staff reviews the performance report. If edits are needed, HUD staff can reject the performance report, returning the performance report to the

	Grantee to be revised and resubmitted. Once the performance report is approved, no further action is necessary.

Chapter 3: Home Page and Resources | Administration Module

Chapter 3: Home Page and Resources | Administration Module i

A. Chapter 3: Home Page and Resources 1

A1. Access the Home Page 1

B. Home Page Features 2

B1. My Announcements 2

B2. My Action Items 3

B3. My Resources 5

C. DRGR Frequently Asked Questions (FAQ) 7

A. Chapter 3: Home Page and Resources

This section provides information on the purpose and features of the **"Home"** page. The **"Home"** page is the page that loads after successful login to the DRGR System. The **"Home"** page provides access to key features such as "My Announcements," "My Resources," and "My Action Items." It also provides information on the user's DRGR User Account under the "My Account" heading and a link to the **My Profile** module, which is further described in Chapter 7.

A1. Access the Home Page

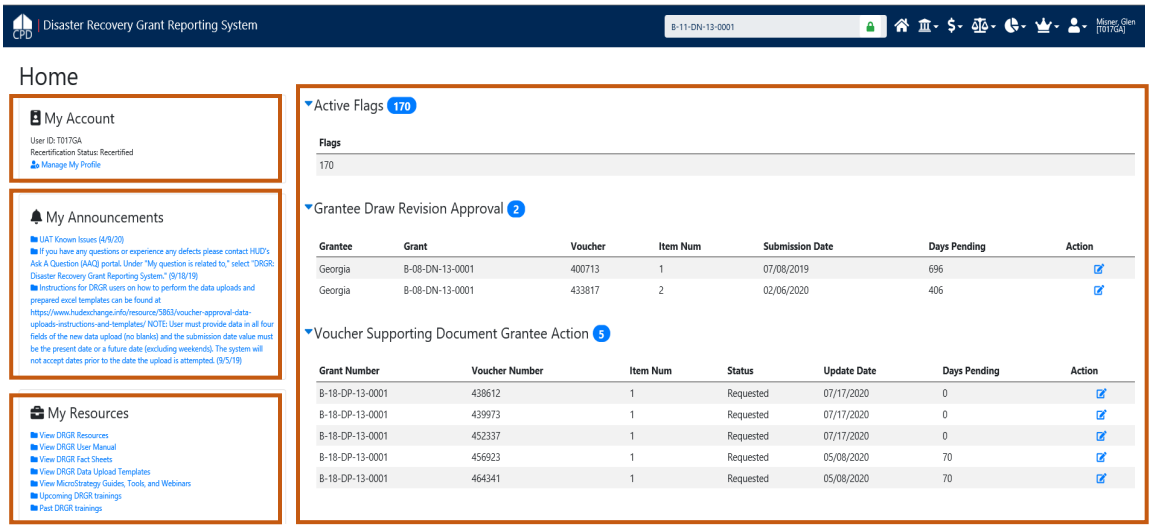
The **"Home"** page serves as the landing page of the DRGR System after a user has successfully logged in.

User Role: Grantee Users and HUD Users	**Menu Option:**
Purpose: Allow Grantee Users and HUD Users to access the **"Home"** page of the DRGR System.	

Complete the following steps to access the "Home" page of the DRGR System:

1 In the DRGR System, select the **Home** module, or icon located in the Navigation Bar.

2 The **"Home"** page will load providing users access to the following key features: "My Account", "My Announcements" (See Section B1), "My Action Items" (See Section B2), and "My Resources" (See Section B3).



B. Home Page Features

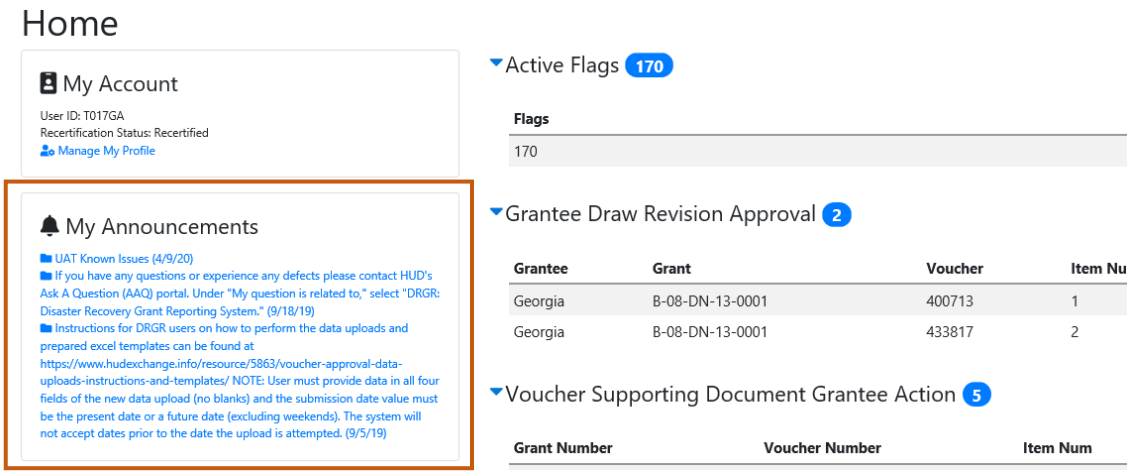
Feature	Description
My Announcements	"My Announcements" provides links to important DRGR System news with the most current news appearing first.
My Resources	"My Resources" provides links to DRGR System resources, including this DRGR User Manual, Fact Sheets, Data Upload Templates, as well as upcoming and past training materials.
Active Flags 815 Collections and Adjustments requiring Approval 4	"My Action Items" display a list of pending items that require completion and are specific to the role(s) and privilege(s) of the DRGR User.

B1. My Announcements

User Role: Grantee Users and HUD Users	**Menu Option:** My Announcements
Purpose: Allow users to view further information on a particular announcement.	

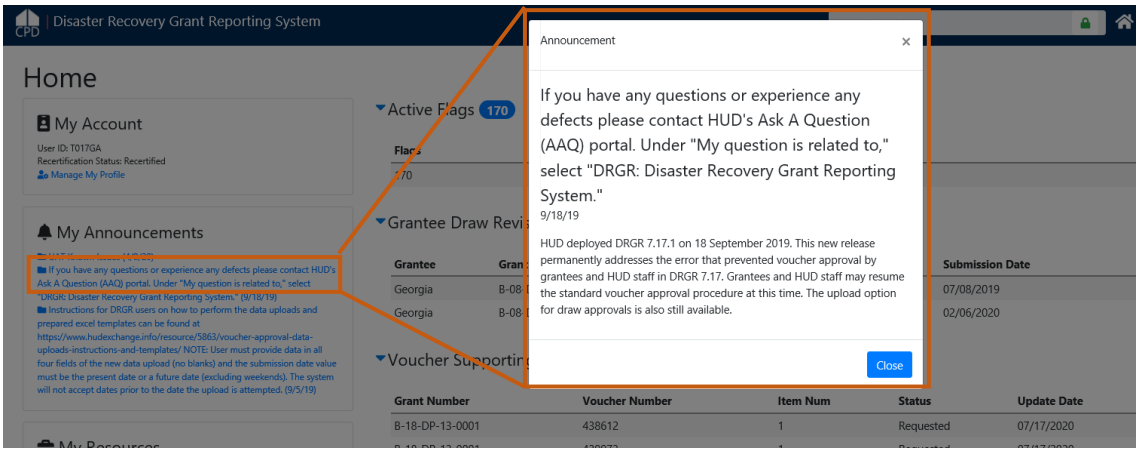
Complete the following steps to view further information on a particular announcement:

1 In the DRGR System, announcements are in collapsed view under the "My Announcements" feature. To view further information, select the desired link.



2 The **"Announcement"** page will load, allowing users to read additional information regarding that announcement.

User Role: Grantee Users and HUD Users	**Menu Option:** My Announcements



B2. My Action Items

The tasks that appear in "My Action Items" are dependent on the user's role. All users in an organization with the same User Profile Roles will receive the same Action Items for that role (User Profile Roles are described in Chapter 5). Once any user completes an action item, that item is cleared from the list of all users with that role. Further information on which Action Items are displayed for each User Profile Role can be found here in the Fact Sheet entitled, "DRGR Action Items Quick Guide." Fact Sheets can be accessed under the "My Resources" section of the **"Home"** page.

TIP! "My Action Items" are a great way to review tasks awaiting your attention that you may have missed in your email inbox.

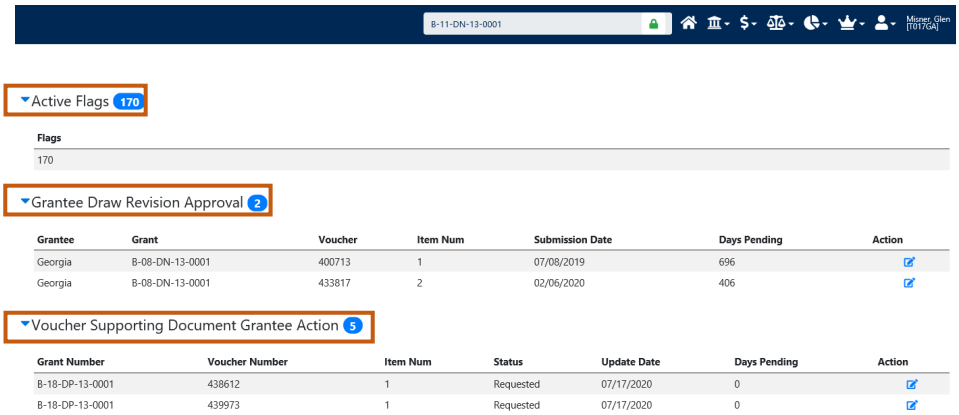
The remainder of this page is intentionally left blank.

User Role: Grantee Users and HUD Users	**Menu Option:** Active Flags 815 Collections and Adjustments requiring Approval 4

Purpose: Allow users to view the "My Action Items" detail and actions.

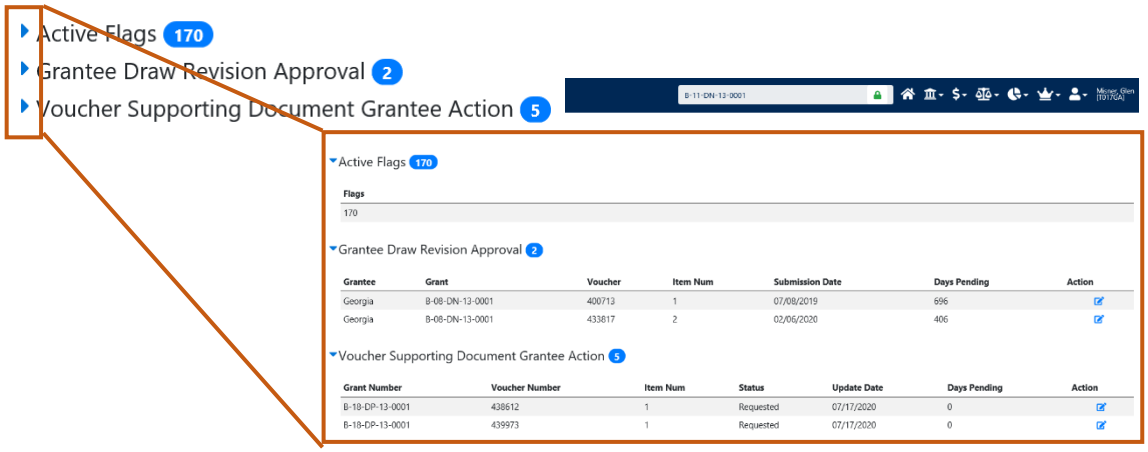
Complete the following steps to view "My Action Items" detail and actions.

1 In the DRGR System, pending tasks are displayed under the "My Action Items" feature.



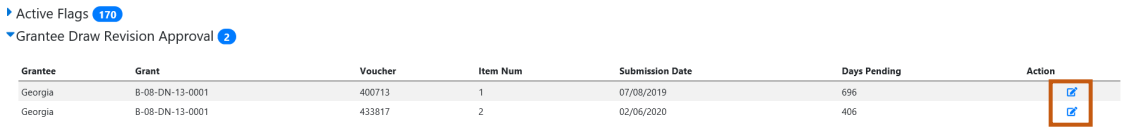
2 To expand and collapse "My Action Items" detail, select the ▸ button.

3 The "My Action Items" detail will be displayed.



User Role: Grantee Users and HUD Users	**Menu Option:** Active Flags 815 / Collections and Adjustments requiring Approval 4

4 To complete a task in the "My Action Items" list, select the edit icon under the "Action" column, next to the desired task.



B3. My Resources

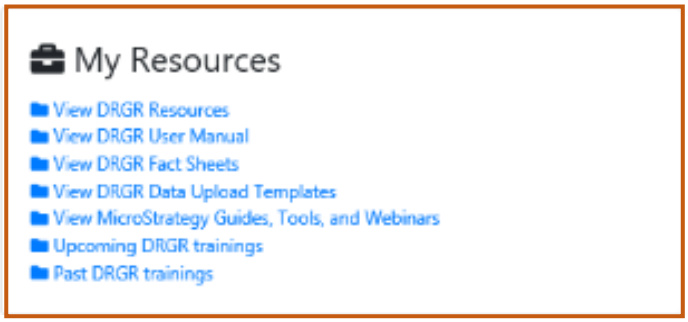
DRGR Users have access to several resources regarding the DRGR System including guides, fact sheets, tools, and training materials. Resources are found on the HUD Exchange and are linked in DRGR on the **"Home"** page under the "My Resources" section. The following steps describe how to access "My Resources."

User Role: Grantee Users and HUD Users	**Menu Option:** My Resources

Purpose: Allow users to access additional resources regarding the DRGR System.

Complete the following steps to access additional resources regarding the DRGR System.

1 Select the link for the desired resource under the "My Resources" heading.



2 This will load a separate window with the HUD Exchange website's DRGR page, which contains all available DRGR resources to date. Scroll down on the HUD Exchange page to review available materials.

User Role: Grantee Users and HUD Users	**Menu Option:** My Resources

Note that the HUD Exchange and HUD.gov also includes other useful links to assist Grantees. On the right side of the DRGR page under "Ask a DRGR Question," questions can be submitted by Grantees to help troubleshoot the DRGR System through the HUD Exchange Ask a Question (AAQ) system at https://www.hudexchange.info/get-assistance/my-question/. Once the question is submitted, a TA provider or HUD staff member will provide a response, typically within three (3) business days.

> TIP! The HUD Exchange and HUD.gov provide additional resources for Grantees on HUD programs and requirements, including DRGR functionality and news about DRGR updates.

Grantees can also request direct or remote TA through the HUD Exchange for more complex troubleshooting needs at https://www.hudexchange.info/technical-assistance/. Grantees should consult with field office staff before submitting TA requests. The CPD Technical Assistance Division determines approval of all submitted TA requests.

All DRGR Users are encouraged to sign-up for the HUD Exchange DRGR Mail List (https://www.hudexchange.info/mailinglist/subscribe/) and the HUD.gov mailing list (https://www.hud.gov/subscribe/mailinglist) to receive announcements related to future DRGR System releases and technical assistance resources.

The remainder of this page is intentionally left blank.

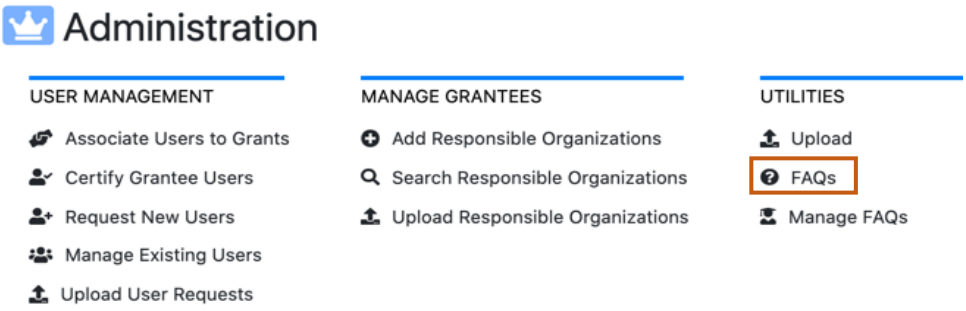
C. DRGR Frequently Asked Questions (FAQ)

The DRGR FAQ is an archive of previously submitted questions and answers, organized by DRGR Module, and includes step-by-step instructions to navigate the DRGR System.

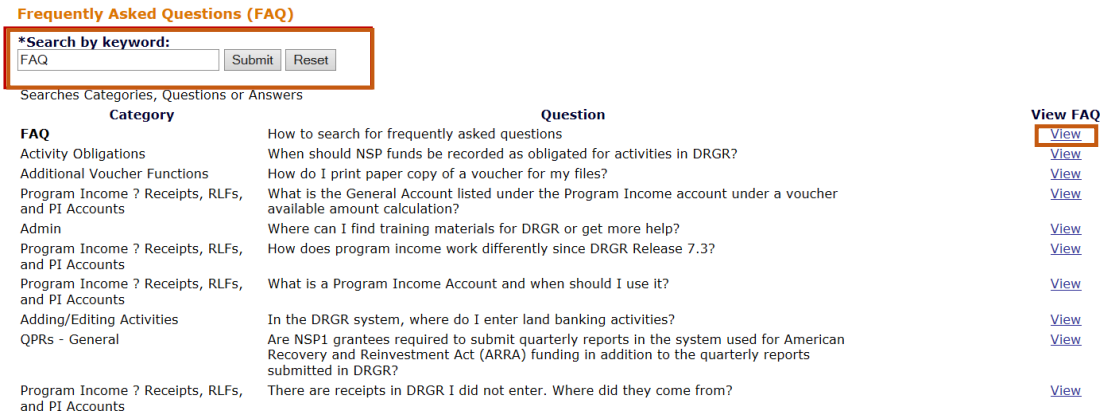
User Role: Grantee Users and HUD Users	**Menu Option:** FAQs
Purpose: Allow Grantee Users to access DRGR Help Desk Frequently Asked Questions (FAQ).	

1 In the DRGR System, select the **Administration** module, or icon, located in the navigation menu.

2 This opens up the dropdown menu items for the **Administration** module. Below the Utilities menu, select the **<FAQs>** option.



3 The **"FAQ"** page allows users to search for existing questions and answers. Enter text in the "Search by Keyword" field and select **<Submit>**. The search results are sorted by category and question relevance. To view the FAQ, select the **<View>** link for the desired FAQ.



Chapter 4: Grants and Grantees | Manage My Grants and Administration Modules

Chapter 4: Grants and Grantees 1

A. Summary of Grantees and Grants 2

A1. Summary of Grantees 2

A2. Summary of Grants 2

B. Manage My Grants Module Access 3

B1. Grantee | Grants 3

B2. HUD | Grants 3

C. Administration Module Access 4

D. Search and View Grants and Grantees 5

D1. Grantee and HUD | View Grants 5

D2. Grantee and HUD | Search Grants 9

D3. HUD | Search and View Grantee Information 11

Chapter 4: Grants and Grantees

This Chapter provides information for Grants and Grantees contained in the **Administration** module and **Manage My Grants** module.

Grantees include state and local governments, non-profits, and technical assistance (TA) Providers. Each Grantee is associated with at least one grant or HUD-funded award in DRGR. Grantees use the DRGR System to create an Action Plan governing the use of grant funds and to report performance accomplishments. TA Providers also use the System to manage TA Staff Rate (or TA Personnel Rates), TA Staff (or TA Personnel), TA Work Plans, and TA Invoices. HUD staff use the DRGR System to review grant-funded activities, prepare reports to Congress and other interested parties, and monitor program compliance.

HUD collects information from the DRGR System to comply with Congressional reporting requirements with respect to the use of grant funds and for other program management purposes. The use of the DRGR System for reporting purposes is mandatory and information submitted to HUD via the DRGR System is public, with a few exceptions.

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

Grantee Users

Menu Option	Subsection	Action
Closeout Grant	--	See Section 29: Closeout
View Grant	D1	Manage My Grants: View Grants
Search Grants	D2	Manage My Grants: Search Grants

HUD Users

Menu Option	Subsection	Action
View Grant	D1	Manage My Grants: View Grants
Search Grants	D2	Manage My Grants: Search Grants
Search Grantees	D3	Administration: Search Grantees
Search/View Responsible Organizations	--	See Chapter 6: Responsible Organizations

A. Summary of Grantees and Grants

A1. Summary of Grantees

In the DRGR System, "Grantees:"

- Are recipients of an award from HUD for a specific purpose (e.g., Disaster Recovery, Technical Assistance)
- Can be states, counties, cities, non-profits, or TA Providers
- May have more than one Grant available for reporting
- Must be associated to a DRGR User Profile, thereby given access to the selected Grantee's Grants
- Allow for user management and certification processes (see Chapter 5) to be separately managed within each Grantee's organization
- Allow for TA Provider Users to see unique functions designed specifically for TA Providers

A2. Summary of Grants

In the DRGR System, "Grants:"

- Are awards from HUD for a specific public purpose (e.g. Neighborhood Stabilization Program)
- Represent fully executed Grant Agreements or Cooperative Agreements
- Directly link to the Line of Credit Control System (LOCCS), a federal web-based system administered by the U.S. Treasury Department allowing Grantees to request and receive funds obligated by HUD under cooperative agreements or Grant agreements
- Create a relationship between the Grant, Grantee, CPD Representative and Action Plan
- Identifies the HUD staff persons, including CPD Representative, responsible for oversight and approval actions in DRGR
- Contain other information that, in many instances, affects other pages across modules
- Must be selected in the Navigation Bar using the "Locked Grant" feature in order to report data for the Grant across modules

The remainder of this page is intentionally left blank.

B. Manage My Grants Module Access

The **Manage My Grants** module contains access to Grants.

B1. Grantee | Grants

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Grant actions.	

Complete the following steps to access the Manage My Grants Module:

1 In the DRGR System, navigate to the **Manage My Grants** module or icon, located in the Navigation Bar.

2 This opens the dropdown menu items for the **Manage My Grants** module with various subheadings. "Grants" appears to the very right of the dropdown menu. The System displays the relevant menu items based on user type and user roles.

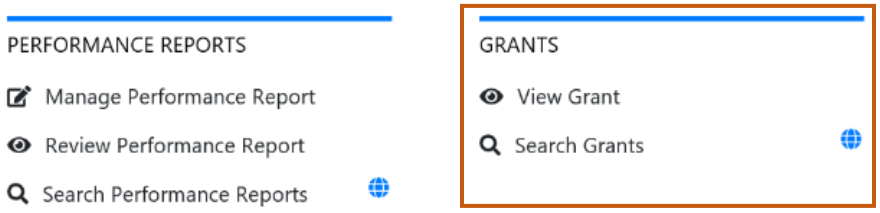
B2. HUD | Grants

User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Grant actions.	

Complete the following steps to access the Grant Management: Grants Module:

1 In the DRGR System, navigate to the **Manage My Grants** module, or icon, located in the Navigation Bar.

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



C. Administration Module Access

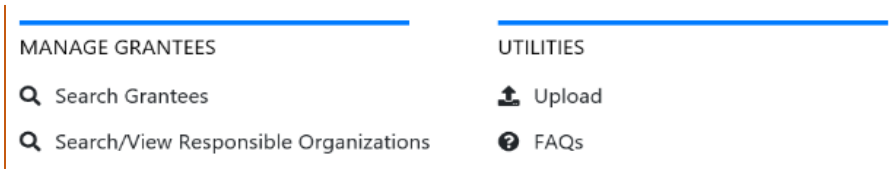
The **Administration** module contains access to Grantees.

User Role: HUD User	**Menu Option:** Administration Module
Purpose: Allow HUD Users to access Grantee actions.	

Complete the following steps to access the Administration Module: Manage Grantees:

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.



D. Search and View Grants and Grantees

This action allows Grantee Users and HUD Users to search and view Grants and Grantees.

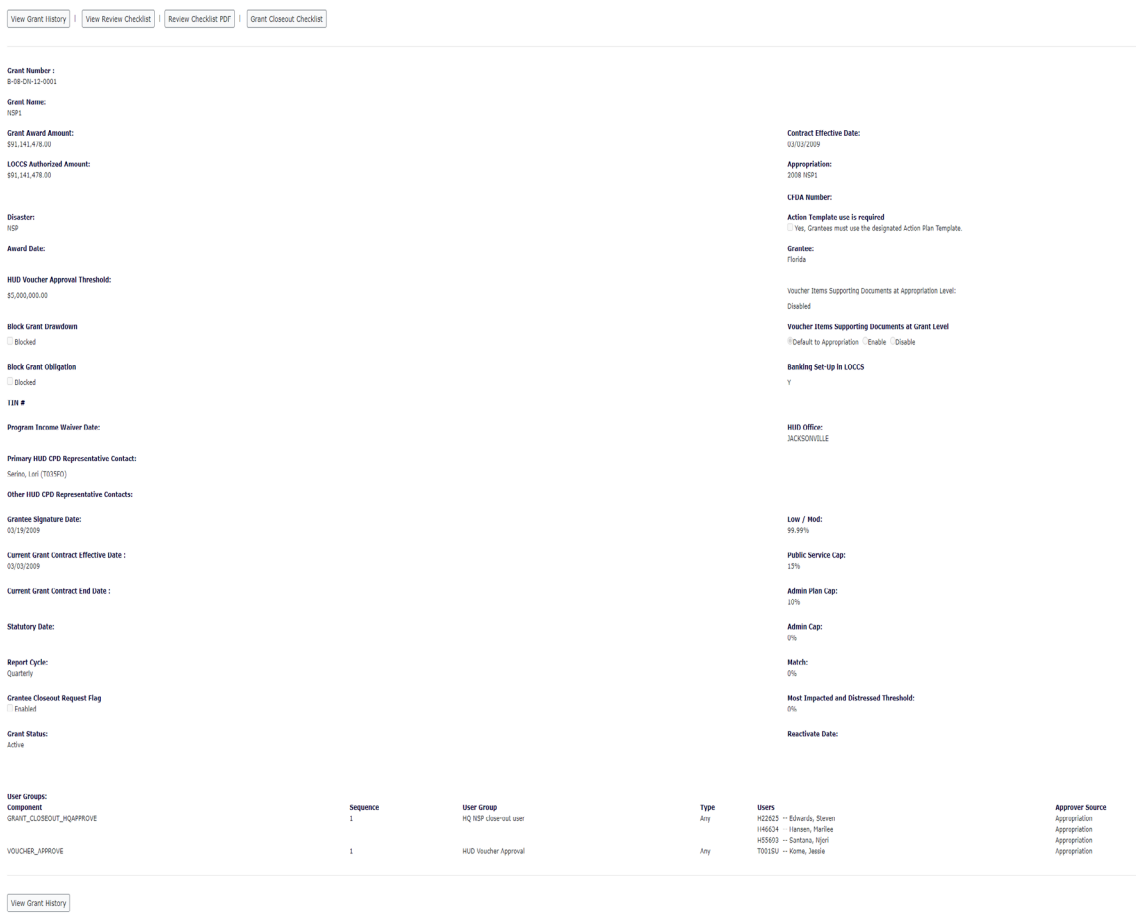
TIP! Refer to Data Analytics Reports - Global Admin folder - A13 to view Grants assigned to Grantees.

D1. Grantee and HUD | View Grants

User Role: Grantee User or HUD User	**Menu Option:** View Grant
Purpose: Allow Grantee Users and HUD Users to view the **"Grant"** page.	

Complete the following steps to access the View Grant page:

1 Navigate to the **Manage My Grants** module as described in Section B above and locate the **Grants** menu. Select the **<View Grant>** link. The **"View Grant"** page will load for the "Selected Grant" in the Navigation Bar. The data fields on the **"View Grant"** page is described below.



The following table describes the fields on the left side of the **"View Grant"** page:

View Grant Page Data Fields (left side)

Data Field	Description
Grant Number	The Grant Number assigned by HUD
Grant Name	A description of the Grant (e.g., associated Public Law Number)
Grant Award Amount	The Grant Award Amount
LOCCS Authorized Amount	The Grant Award Amount as reported in LOCCS
Disaster	The associated FEMA disaster declaration(s)
Award Date	The date the Grant award was awarded, if applicable (not always populated)
HUD Voucher Approval Threshold	The minimum amount of fund on a Voucher Line Item that will automatically trigger HUD approval
Block Grant Drawdown	If selected, the ability to draw funds is blocked for the entire Grant
Block Grant Obligation	If selected, the ability to obligate funds is blocked for the entire Grant
TIN #	Grantee Tax Identification Number
Program Income Waiver Date	The date a Program Income Waiver was approved by HUD, if applicable
Primary HUD CPD Representative Contact	Designated CPD Representative
Other HUD CPD Representative Contact	Back-up CPD Representative(s)
Grantee Signature Date	Date Grantee's authorized representative signed the Grant agreement or cooperative agreement (not always populated)
Current Grant Contract Effective Date	The most current Grant agreement execution date (changes based on LOCCS obligation actions)
Current Grant Contract End Date	The current end date of the Grant agreement (changes based on grant agreement extensions)
Statutory Date	Expenditure deadline date based on Congressional appropriation
Report Cycle	The submission frequency of performance reports

Grantee Closeout Request Flag	If selected, the ability to request Grant closeout is available for Grantee
Grant Status	Status of the Grant (e.g., Active, Closed)

The following table describes the fields on the right side of the **"View Grant"** page:

View Grant Page Data Fields (right side)

Data Field	Description
Contract Effective Date	The initial Grant agreement execution date
Appropriation	A label assigned to group a set of Grants authorized under the same appropriation(s)
CFDA Number	Catalog of Federal Domestic Assistance Number
Grantee	The Grantee associated with the Grant
Voucher Item Supporting Documents at Appropriation Level	If selected, the Appropriation allows for attaching supporting documents to vouchers at the line item level
Voucher Item Supporting Documents at Grant Level	If enabled, the Grant allows for attaching supporting documents to vouchers at the line item level
Banking Set-Up in LOCCS	Displays "Y" or "N" to note if LOCCS bank account was setup when Grantee first appeared in DRGR. Since this is a one-time data transfer from LOCCS, and does not always represent the Grantee's current ability to successfully draw funds for the Grant from LOCCS
HUD Office	The HUD Field Office responsible for managing the Grant
Low / Mod %	The minimum percentage of the Grant Amount that must be spent on Low Mod Persons
Public Service Cap	The maximum percentage of the Grant Amount that can be spent on Public Service Activity Types
Admin Plan Cap	The maximum percentage of the Grant Amount that can be spent on the combined Administration and Planning Activity Types

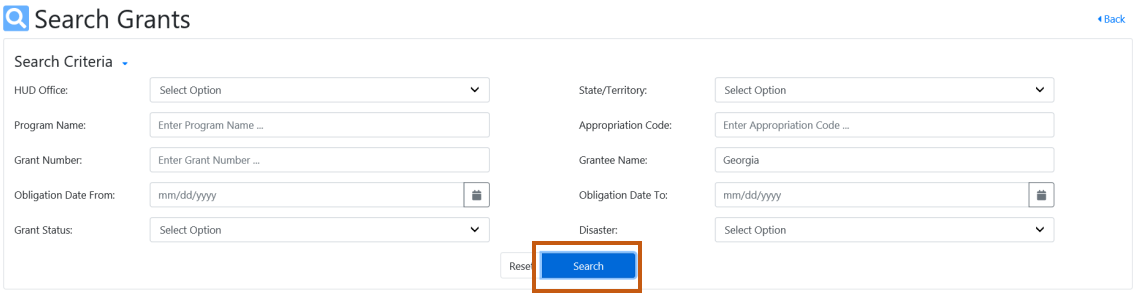
State Admin Plan Cap	The maximum percentage of the Grant Amount that can be spent on Administration Activity Types
Match	The minimum percentage of the Grant Amount that must be matching contributions by other funding sources
Reactive Date	The date Grant reactivated if closed in error, if applicable
User Groups	A list of user groups, user group types, and DRGR users allowed to take approval actions for the Grant or the Appropriation associated with the Grant (see the Approver Source column) These groups are setup by HUD Super User or Manager (see HUD specific Chapter 37 of this User Manual)

D2. Grantee and HUD | Search Grants

User Role: Grantee User or HUD User	**Menu Option:** Search Grants
Purpose: Allow Grantee Users and HUD Users to search for Grants.	

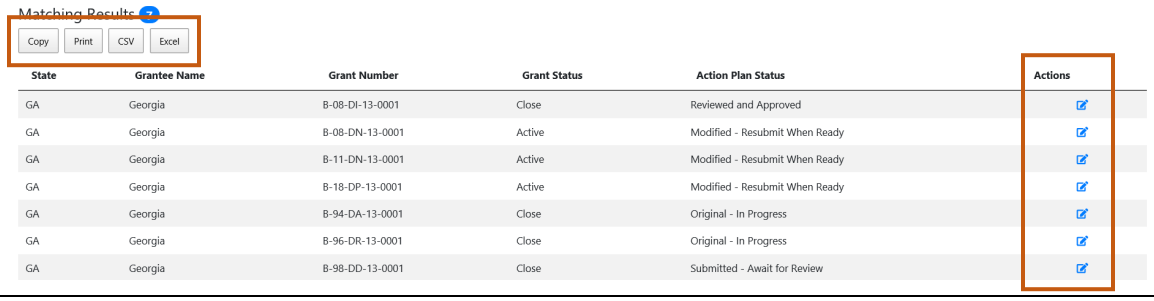
Complete the following steps to search for a Grant to view:

1 Navigate to the **Manage My Grants** module as described in Section B above and locate the **Grants** menu. Select the **<Search Grants>** link. The **"Search Grants"** page loads. Enter search criteria and select **<Search>**. The search criteria are described below.



2 Search results will be displayed. Select **<View>** in the "Action" column to the right of the desired Grant to load the **"View Grant"** page.

User Role: Grantee User or HUD User	**Menu Option:** Search Grants



3 Above the search results, users can also select for **<Copy>**, **<Print>**, **<CSV>**, and **<Excel>**.

- Select **<Copy>** to copy the search results to paste into another application (e.g., MS Excel or Word). Select **<Print>** to print the search results.
- Select **<CSV>** to download the search results into a CSV file.
- Select **<Excel>** to download the search results into an Excel file.

Search Grants Page Data Fields

Data Field	Description
HUD Office	The HUD Field Office responsible for managing the Grant
State/Territory	State or Territory
Program Name	The Program Name
Appropriation	A label assigned to group a set of Grants authorized under the same appropriation(s)
Grant Number	The Grant Number
Grantee Name	The Grantee associated with the Grant
Obligation Date From	Beginning date for searching obligation
Obligation Date To	End date for searching obligation
Grant Status	Status of the Grant (e.g., Active, Closed)
Disaster	The associated FEMA disaster declaration(s)

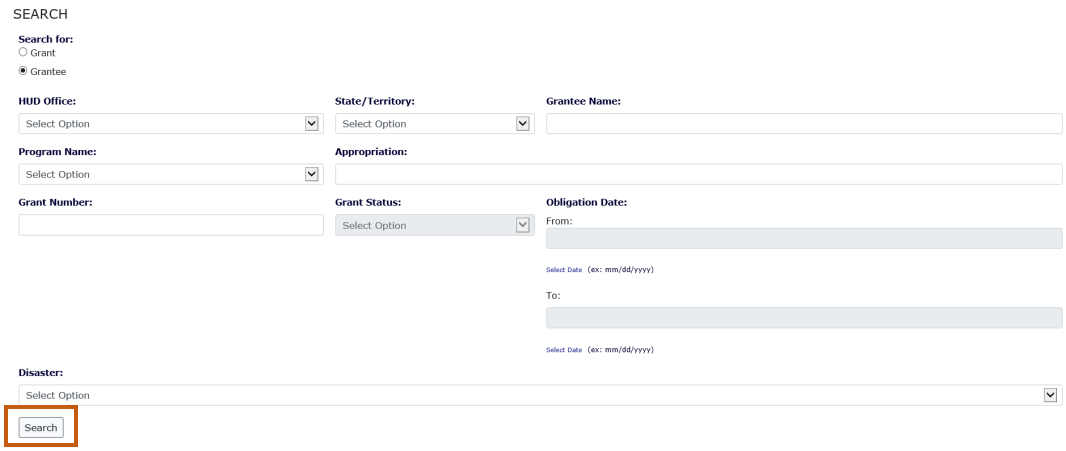
D3. HUD | Search and View Grantee Information

Complete the following steps to search for and view Grantee information.

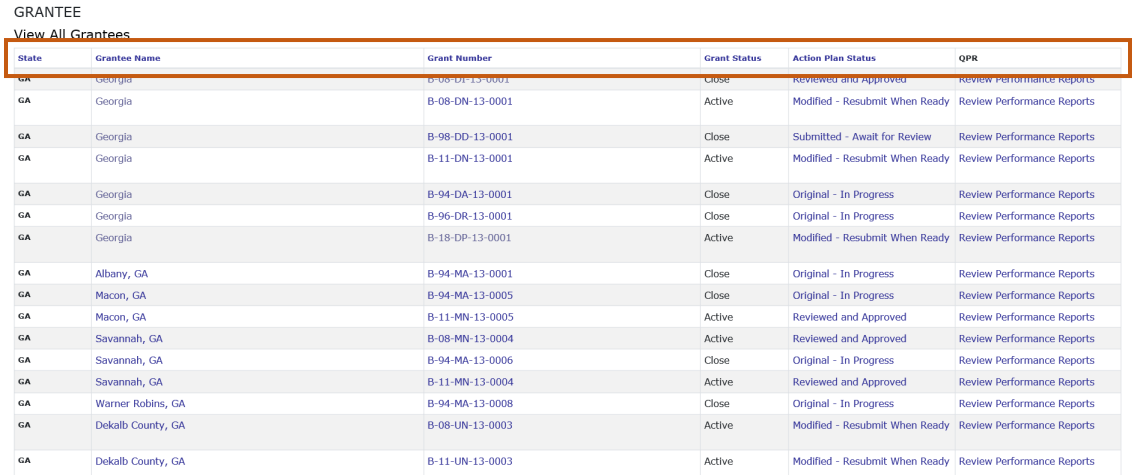
User Role: HUD User	**Menu Option:** Search Grantees
Purpose: Allow HUD Users to search and view Grantee information.	

Complete the following steps to search and view Grantee information:

1 Navigate to the **Administration** module as described in Section C above and locate the **Manage Grantees** menu. Select the **<Search Grantees>** link. The **"Search"** page loads. Enter search criteria and select **<Search>**. The search criteria are described below.



2 Search results will be displayed with various information and links to other DRGR pages associated with the Grantee.



GRANTEE

View All Grantees

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
GA	Georgia	B-08-DN-13-0001	Active	Modified - Resubmit When Ready	Review Performance Reports
GA	Georgia	B-98-DD-13-0001	Close	Submitted - Await for Review	Review Performance Reports
GA	Georgia	B-11-DN-13-0001	Active	Modified - Resubmit When Ready	Review Performance Reports
GA	Georgia	B-94-DA-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Georgia	B-96-DR-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Georgia	B-18-DP-13-0001	Active	Modified - Resubmit When Ready	Review Performance Reports
GA	Albany, GA	B-94-MA-13-0001	Close	Original - In Progress	Review Performance Reports
GA	Macon, GA	B-94-MA-13-0005	Close	Original - In Progress	Review Performance Reports
GA	Macon, GA	B-11-MN-13-0005	Active	Reviewed and Approved	Review Performance Reports
GA	Savannah, GA	B-08-MN-13-0004	Active	Reviewed and Approved	Review Performance Reports
GA	Savannah, GA	B-94-MA-13-0006	Close	Original - In Progress	Review Performance Reports
GA	Savannah, GA	B-11-MN-13-0004	Active	Reviewed and Approved	Review Performance Reports
GA	Warner Robins, GA	B-94-MA-13-0008	Close	Original - In Progress	Review Performance Reports
GA	Dekalb County, GA	B-08-UN-13-0003	Active	Modified - Resubmit When Ready	Review Performance Reports
GA	Dekalb County, GA	B-11-UN-13-0003	Active	Modified - Resubmit When Ready	Review Performance Reports

3 Information displayed on the **"Search Results"** page includes:

- The first column labeled "State" displays the Grantee State.
- The second column labeled "Grantee Name" provides a link to the **"View Grantee Profile"** page.
- The third column labeled "Grant Number" provides a link to the **"View Grant"** page.
- The fourth column labeled "Grant Status" displays the status of the Grant.
- The fifth column labeled "Action Plan Status" displays the status of the Action Plan and provides a link to the **"Review/View Action Plan"** page.
- The sixth column labeled "QPR" provides a link to the **"Review/View QPR"** page.

Search Grantee Page Data Fields

Data Field	Description
Search for Grant or Grantee	Select the appropriate radio button to search for Grants or Grantees
HUD Office	The HUD Field Office responsible for managing the Grant
State/Territory	State or Territory
Program Name	The Program Name
Appropriation	A label assigned to group a set of Grants authorized under the same appropriation(s)
Grant Number	The Grant Number
Grantee Name	The Grantee associated with the Grant
Obligation Date From	Beginning date for searching obligation
Obligation Date To	End date for searching obligation
Grant Status	Status of the Grant (e.g., Active, Closed)
Disaster	The associated FEMA disaster declaration(s)

GRANTEE

View Grantee

Close

Delete

Grantee Name:
Georgia

Status:
Active

Block Drawdown:

☐ Blocked

Email:
asorino@gema.state.ga.us

DRGR Grantee ID:

Address 1:
935 E. Confederate Ave.; P.O. Box 18055

DUNS #:

TIN #:

System for Award Management:

Entity

Status:

Entity DUNS#:

CAGE Code:

Has Active Exclusion?

DoDAAC:

Expiration Date:

Delinquent Federal Debt?

Address 2:

Address 3:

Phone Number: Ext:
4046357235

City:
Atlanta

Fax:
4046357205

State:
GA

Grantee Type:

State

Zip Code:

30316-0055

Chief Executive Officer

First Name:

Last Name:

Title:

Email:

Phone Number: **Ext:**

Fax:

Address 1:

Address 2:

Address 3:

City:

State:

Zip Code:

Primary Point of Contact

First Name:
Rob

Last Name:
Show

Title:

Email:

Phone Number: **Ext:**

Fax:

Address 1:

Address 2:

Address 3:

City:

State:

Zip Code:

Associated Grant	Grant Status	Action Plan	Action Plan Status	QPR
B-08-DI-13-0001	Close	View Action Plan	Reviewed and Approved	01/01/2018
				10/01/2017
				07/01/2017
				04/01/2017

The remainder of this page is intentionally left blank.

Data Field	Description
Grantee Name	The name of Grantee associated with the Grant
Status	Status of the Grantee (e.g., Active, Closed)
HUD Office	The HUD Field Office responsible for managing the Grant
State/Territory	State or Territory
Program Name	The Program Name
Appropriation	A label assigned to group a set of Grants authorized under the same appropriation(s)
Grant Number	The Grant Number
Grantee Name	The Grantee associated with the Grant
Obligation Date From	Beginning date for searching obligation
Obligation Date To	End date for searching obligation
Disaster	The associated FEMA disaster declaration(s)

The remainder of this page is intentionally left blank.

Chapter 5: User Management and Certifications | Administration Module

Chapter 5: User Management and Certifications 1

A. Administration Module Access 2

A1. Grantee | User Access 2

A2. HUD | User Access 2

B. Associate Grantee Users to Grants 3

B1. Grantee | Associate Grantee Users to Grants 3

C. Certify and Activate Users 5

C1. Grantee | Certify and Activate Grantee Users 5

C2. HUD | Certify and Activate Grantee Administrators 7

C3. HUD | Certify and Activate HUD Office Users 8

D. Summary of User Accounts and Profiles 9

D1. DRGR User Accounts Versus Profiles 9

D2. Grantee User Account Management Workflow 9

D3. HUD User Account Management Workflow 10

D4. Summary of User Roles 10

E. Managing Grantee User Accounts 14

E1. Grantee | Request New User 14

E2. Grantee | Manage Existing User 16

E3. HUD | Request New User 18

E4. HUD | Manage Existing User 20

E5. HUD | Approve User Request 22

E6. HUD | HQ User Request Approvals 23

Chapter 5: User Management and Certifications

This Chapter provides information for managing DRGR user accounts, including associating users, certifying users, requesting new users, and managing existing users contained in the **Administration** module.

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

Grantee Users

Menu Option	Subsection	Action
Associate Users to Grants	B1	Assign Grantees users to access certain Grants
Certify Grantee Users	C1	Recertify Grantee Users every six months
Request New Users	E1	Request DRGR user accounts for the first time
Manage Existing Users	E2	Modify existing DRGR user accounts
Upload User Requests	--	See Chapter 34: DRGR Uploads

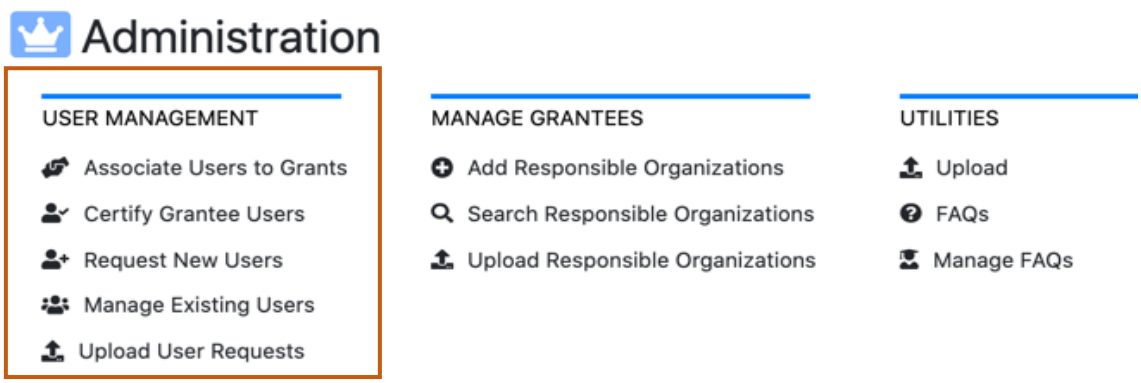
HUD Users

Menu Option	Subsection(s)	Action(s)
Certify Grantee Admin Users	C2 E5	Recertify Grantee Admin Users every six months Manage User Requests for Grantee Administrators
Certify Grantee Users	C2 E5	Recertify Grantee Users every six months Manage User Requests for Grantee Users
Certify HUD Office Users	C3	Recertify HUD Users every six months
Request New Users	E3	Request DRGR user accounts for the first time
Manage Existing Users	E4	Modify existing DRGR user accounts
Upload User Requests	--	See Chapter 34: Data Uploads

A. Administration Module Access

The **Administration** module contains all user management functions.

A1. Grantee | User Access

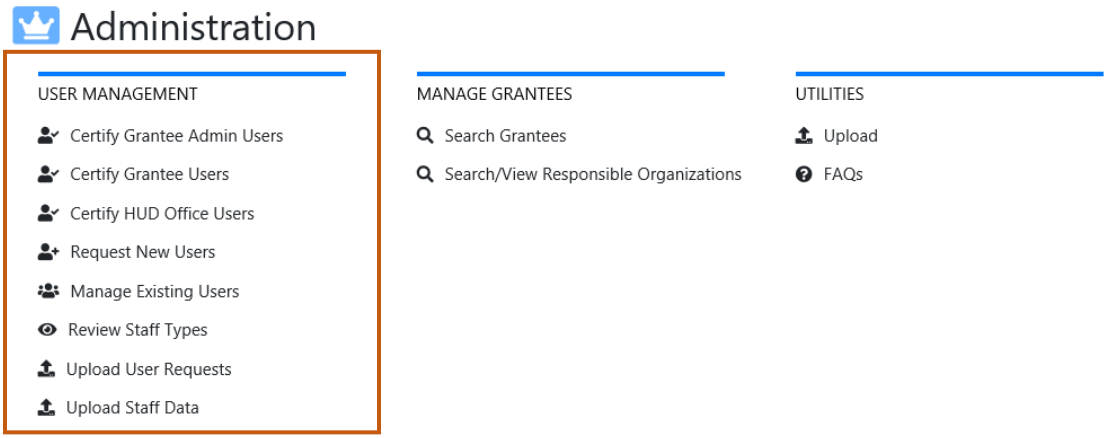
User Role: Grantee User	**Menu Option:** **Administration** Module
Purpose: Allow Grantee Users to access User Management actions.	
Complete the following steps to access the Administration Module:	
1 In the DRGR System, select the **Administration** module, or icon, located in the navigation menu.	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



B. Associate Grantee Users to Grants

This action allows the Grantee administrator to add or remove Grantee users' access to Grants within the Grantee's portfolio. This step is necessary for all Grantee users to work on Action Plans, QPRs, etc. for one or more Grants.

TIP! Refer to DRGR Data Analytics Report A44 to view existing Grantee User access to grants.

B1. Grantee | Associate Grantee Users to Grants

User Role: Grantee Administrator	**Menu Option:** Associate Users to Grants

Purpose: Allow Grantee Users to access one or more Grants.

Complete the following steps to Associate or De-Associate Users to Grants:

1 Navigate to the **Administration** module, locate the **User Management** menu, select the **<Associate Users to Grant>** link. See step A1 above. A page will load showing a list of available Grants. In the "Grant Number" column, select the desired **<Grant Number>** to which users will be associated or from which users will be de-associated.

Grant Number		Grant Status
B-08-MN-36-0103		Active
B-09-LN-NY-0007		Active
B-11-MN-36-0103		Active
B-13-MS-36-0001		Active
B-13-MS-36-0002		Active

User Role: Grantee Administrator	**Menu Option:** Associate Users to Grants

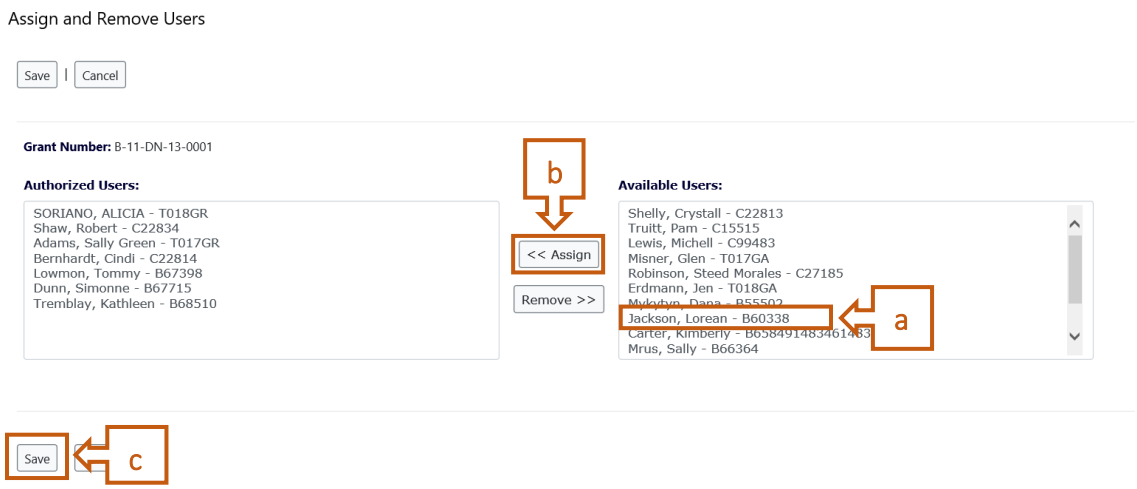
2 To assign a Grantee User, follow the steps below:

a. Choose the user to be assigned by selecting the user's name in the "Available Users" box.

b. To assign a name to a Grant, select **<Assign>**. The users name will slide over to the "Authorized Users" box.

c. Select **<Save>**. The action is complete, and the user is associated to the Grant and will be able to access functions available to the user's role within the Grant.

To de-associate a user from a Grant, follow the steps in reverse order by highlighting the name in the "Authorized User" box, selecting the **<Remove>** link so that the name slides to the "Available Users" box, and selecting **<Save>.** The action is complete, and the user is de-associated from the Grant.



3 To unassign a user, select the desired user from the "Authorized Users" dialogue box and select **<Remove>**. Select **<Save>** for changes to take effect.

The remainder of this page is intentionally left blank.

C. Certify and Activate Users

In addition to the initial certification, a recertification process occurs every six (6) months (January 1 and July 1), requiring every DRGR user to be recertified by a higher-level user. If a DRGR user's certification expires, they will be unable to login until the recertification process is completed.

> TIP! Refer to DRGR Data Analytics Report A42 to view existing Grantee User Certification status.

Thirty (30) days prior to January 1 and July 1, users will receive a pop-up message every time they login to the DRGR System until their account is recertified. If a user is not recertified within 30 days, their account will become "Inactive," and the user will remain unable to login to the DRGR System. The user's account can easily be reactivated by the Grantee Administrator using the recertification process.

The following figure shows the hierarchy of recertification. The HUD Superuser represents the highest level of recertification. Each user in the figure must be recertified by the user to the left.

Hierarchy of User Certification

C1. Grantee | Certify and Activate Grantee Users

User Role: Grantee Administrator	**Menu Option:** Certify Grantee Users

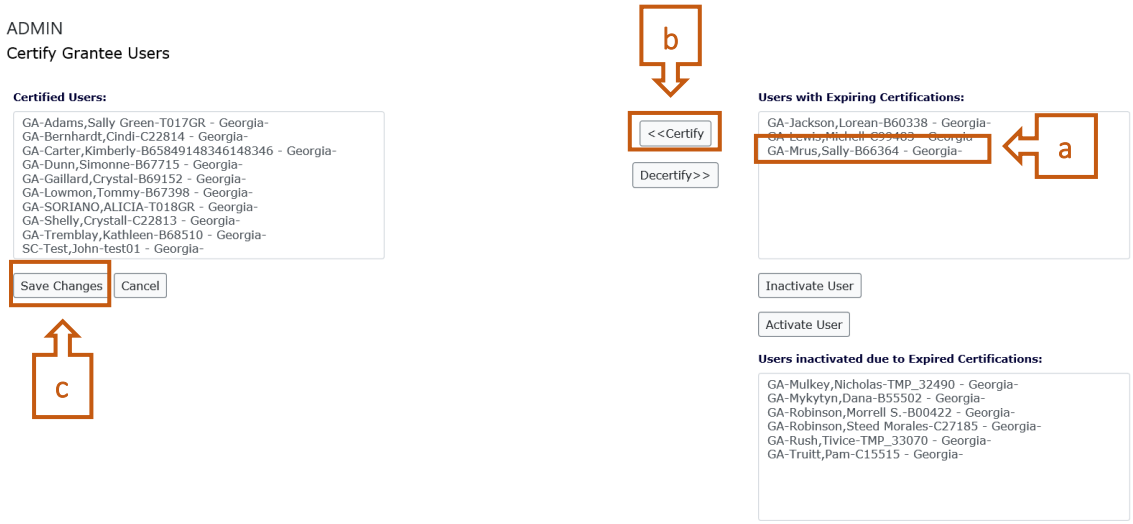
Purpose: Allow Grantee Administrators to Certify Grantee Users. The following shows the hierarchy of user certifications:

Complete the following steps to (Re)certify and/or (In)Activate Grantee Users:

1. Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify Grantee Users>** link. See step A1 above. The **"Certify Grantee Users"** page will load.

2. To recertify a Grantee User, follow the steps below:
   a. Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box.
   b. Select **<Certify>**. The users name will slide over to the "Certified Users" box.
   c. Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.

User Role: Grantee Administrator	**Menu Option:** Certify Grantee Users



3 To reactivate a Grantee User or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" box and select **<Activate User>.** The selected user will move to "Users with Expiring Certifications," then follow the steps above in 1 for recertifying expired users.

4 To decertify or deactivate a Grantee User, complete steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.

The remainder of this page is intentionally left blank.

C2. HUD | Certify and Activate Grantee Administrators

User Role: CPD Representative	**Menu Option:** Certify Grantee Admin Users

Purpose: Allow CPD Representatives to Certify Grantee Administrators. The following shows the hierarchy of user certifications:

Complete the following steps to (Re)certify and/or (In)Activate Grantee Administrators:

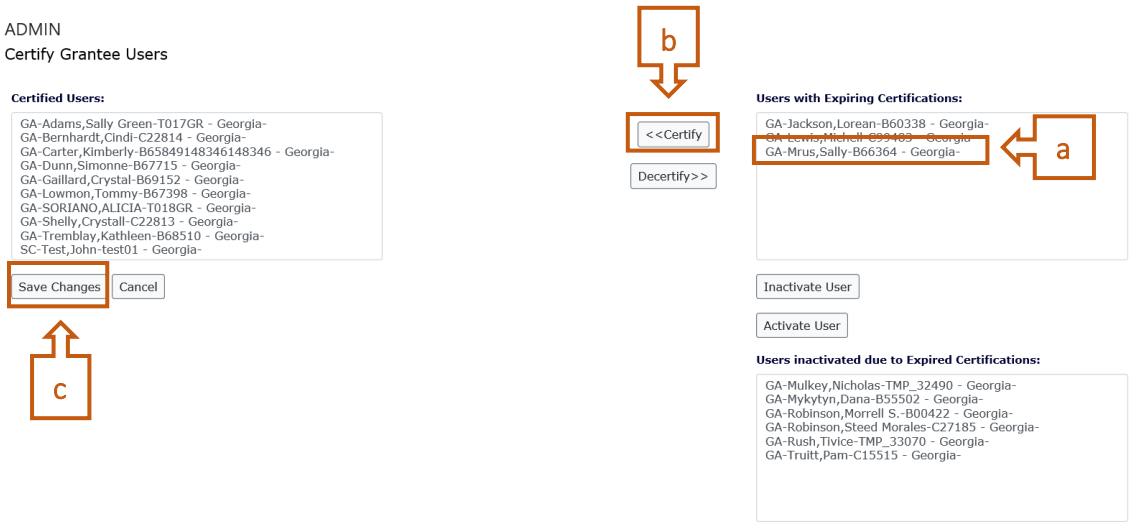
1 Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify Grantee Users>** link. See step A2 above. The **"Certify Grantee Users"** page will load.

2 To recertify a Grantee User, follow the steps below:

a. Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box.

b. Select **<Certify>**. The users name will slide over to the "Certified Users" box.

c. Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.



3 To reactivate a Grantee User or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" and select **<Activate User>,** the selected user will be relocated to the "Users with Expiring Certifications," box then follow the steps above in Step 1 for recertifying expired users.

User Role: CPD Representative	**Menu Option:** Certify Grantee Admin Users
4 To decertify or deactivate a Grantee User, complete Steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.	

C3. HUD | Certify and Activate HUD Office Users

User Role: Field Office Manager	**Menu Option:** Certify HUD Office Users

Purpose: Allow Field Office Managers to Certify HUD Office Users (e.g., CPD Representatives). The following shows the hierarchy of user certifications:

Complete the following steps to (Re)certify and/or (In)Activate HUD Office Users:

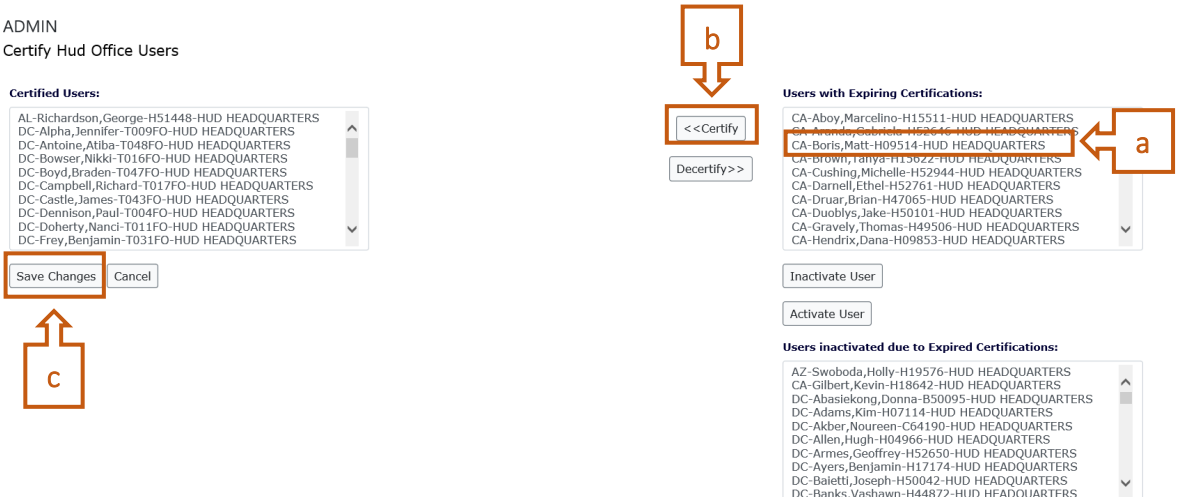
1 Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify HUD Office Users>** link. See step A2 above. The **"Certify HUD Office Users"** page will load.

2 To recertify a HUD Officer User, follow the steps below:

a. Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box.

b. Select **<Certify>**. The users name will slide over to the "Certified Users" box.

c. Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.



3 To reactivate a HUD Office User or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" box and select **<Activate User>**, the

User Role: Field Office Manager	Menu Option: Certify HUD Office Users
selected user will be relocated to "Users with Expiring Certifications," box then follow the steps above in Step 1 for recertifying expired users.	
4 To decertify or deactivate a HUD Office User, complete Steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.	

D. Summary of User Accounts and Profiles

D1. DRGR User Accounts versus Profiles

Every DRGR user must have a user account and one or more user profiles. In most instances, the terms "User Account" and "User Profile" are used interchangeably since most users have only one user profile associated with their user account.

- A User Account grants access to the DRGR System.
- A User Profile grants access to a portfolio of Grants within in the DRGR System.
- For Grantee Users, the User Profile is associated with a Grantee Profile. For HUD Users, the User Profile is associated with a HUD Field Office.
- User Accounts can have one or more User Profiles, but most User Accounts have only one User Profile since most Grantee staff only work for a single Grantee.
- Each User Profile gives the user certain access, roles, and privileges.

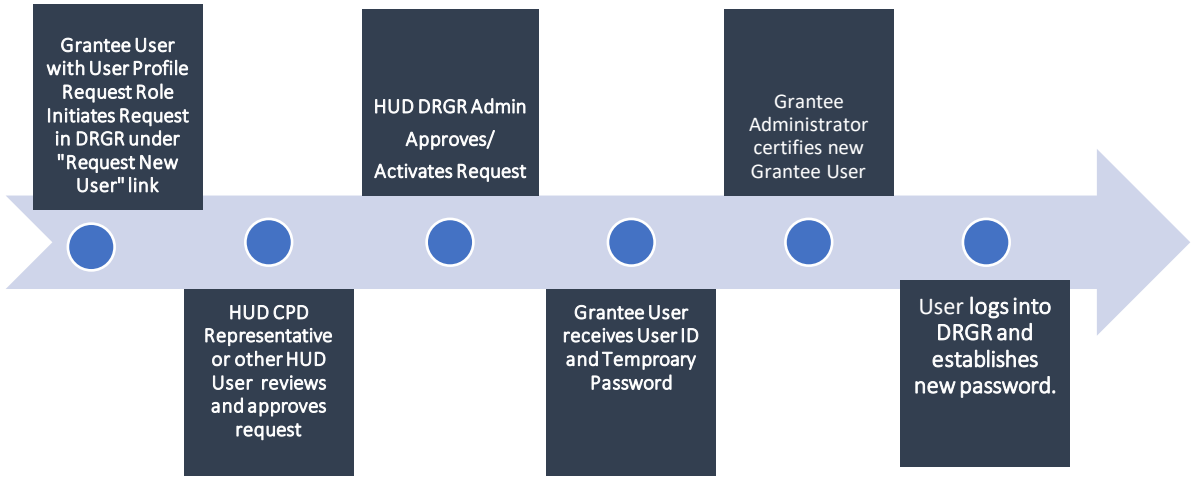
D2. Grantee User Account Management Workflow

Grantee user accounts are managed entirely within the DRGR System:

- Grantee Users and HUD Users with the "User Profile Request" role can request to add a new user or modify an existing user.
- All user requests must be reviewed and approved by the HUD Field Office (either the CPD Representative or Field Office Manager) and the HUD DRGR Administrator.
- Automated status emails will be generated and sent to affected Grantee and HUD users throughout the request and approval process.

The remainder of this page is intentionally left blank.

Grantee User Account Workflow



Note: HUD user's self-submitted and Grantee Administrator/Regular User update requests go directly to the HUD DRGR Administrator for activation.

D3. HUD User Account Management Workflow

HUD user accounts are processed through DIAMS at http://diams.hud.gov. HUD users should speak with their supervisor to request access to the DRGR System.

D4. Summary of User Roles

User roles grant certain privileges and access to DRGR users. User roles are managed at the User Profile Level. The following depicts the user roles available to Grantee and HUD users and a brief description of each.

TIP! Refer to DRGR Data Analytics Report A44 to view existing User Roles.

Grantee and HUD User Roles

HUD Profile:

HUD Office	HUD Program	View Only	HQ Admin	Super User	Approve Drawdown	User Profile Request	Update FAQ	Office of Inspector General	Active	
		☐	☐	☐	☐	☐	☐	☐	☐	

Add HUD Profile

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active	
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	

Add Grantee Profile

Role	User Profile Type	Description
Grantee Admin	Grantee	Enables associate and recertify Grantee users
User Profile Request	Grantee and HUD	Enables user management
Request Drawdown	Grantee	Enables manage obligation and create voucher
Approve Drawdown	Grantee and HUD	Enables manage obligation and approve voucher
Submit Voucher Doc to HUD	Grantee	Enables submit voucher line item documents
Submit Action Plan	Grantee	Enables submit action plan
Submit Performance Reports	Grantee	Enables submit QPR
Staff Rate	Grantee	Enables submission of staff rates and associate TA staff to rates
Contractor	Grantee	Not in use and not covered in this manual
View Only	Grantee and HUD	Enables view only (no edit) privileges
Update FAQ	Grantee and HUD	Enables ability to edit FAQs
HQ Admin	HUD	Enables HQ user management
Super User	HUD	Enables Superuser privileges
Office of Inspector General	HUD	Enables unique view only (no edit) privileges

The remainder of this page is intentionally left blank.

Grantee User Roles and Privileges

		Basic Roles			Additional Roles							
Module	**Function/Capability**	**Grantee Admin**	**Grantee User**	**Grantee View Only**	**Request Drawdown**	**Approve Drawdown**	**Voucher Documents**	**Request User Account**	**Submit QPR**	**Submit Action Plan**	**Submit TA Work Plan**	**TA Staff Rate View**
Administration	Certify Grantee Users	X										
	Assign Users to Grant	X										
	Add/Edit/Deactivate Users							X				
	View Responsible Orgnizations	X	X	X								
	Add/Edit Responsible Organizations	X	X									
	View/Submit TA Staff Rates											X
	Associate TA Staff to Rates											X
Grant Management: Action Plan	View Action Plans	X	X	X								
	Add/Edit Action Plans	X	X									
	Submit Action Plans									X		
	View Action Plan Review Tools	X	X	X								
	View/Edit Rates on TA Workplans	X	X	X								
	View TA Workplans	X	X	X								
	Submit TA Workplans										X	
Grant Management: QPR	View QPRs	X	X	X								
	Edit QPRs	X	X									
	Submit QPRs								X			
	View QPR Review Tools	X	X	X								
Financial	View Obligations	X	X	X								
	Update Obligations				X	X						
	View Drawdowns	X	X	X								
	Create/Revise Drawdowns				X							
	Approve Drawdowns					X						
	Submit Voucher Documents						X					
	View Receipts	X	X	X								
	Create/Edit Receipts				X	X						
	View PI Accounts	X	X	X								
	Create/Edit PI Accounts				X	X						
	Block Project Drawdowns				X	X						
	Block Activity Drawdowns				X	X						
	Edit Rates on TA Invoices											X
	View TA Invoices	X	X	X								
	Submit TA Invoices				X	X						
Compliance	View Flags	X	X	X								
	Manage Flags	X	X									
	View Monitoring/TA Events	X	X	X								
	Add/Edit Monitoring/TA Events	X	X									
Reports	View MicroStrategy Reports	X	X	X								

NOTE: Grantees must have at least two DRGR Users with "Drawdown Roles": one to create the voucher, and another to approve the voucher.

HUD User Roles and Privileges

		Basic Roles					Additional Roles							
Module	Function/Capability	Superuser	HQ Admin	HUD User	HQ View Only	HQ OIG User	Draw Threshold Review	Drawdown Approver	Voucher Documents	Request User Account	Add/Edit FAQ	HUD FO Manager	CPD Representative	Staff Rate Approver
Administration	Certify HUD FO Managers	X												
	Add HUD FO Managers and Users	X												
	Certify HUD Field Office Users	**X**										**X**		
	Certify Grantee Administrators	**X**											**X**	
	Add/Edit/Deactivate Users	**X**	**X**							**X**		**X**	**X**	
	Manage Appropriations	X												
	View Appropriations	X			X	X								
	Manage Grants/Grantees	X												
	View Grants/Grantees	X			X	X								
	Add/Edit FAQs	**X**									**X**			
	View TA Staff Rates	X				X								
	Approve TA Staff Rates	**X**												**X**
	Associate TA Staff to Rates	**X**												**X**
Grant Management: Action Plan	View Action Plans	X		X	X	X								
	Review Action Plans	**X**										**X**	**X**	
	View Action Plan Review Tools	X		X	X	X								
	View/Add Rates on TA Workplans	**X**												**X**
	View TA Workplans	X		X	X	X								
	Approve TA Workplans	**X**										**X**	**X**	
Grant Management: QPR	View QPR	X		X	X	X								
	Review QPR	**X**										**X**	**X**	
	View QPR Review Tools	X		X	X	X								
Financial	View Obligations	X		X	X	X								
	View Drawdowns	X		X	X	X								
	Approve Vouchers over Threshold	**X**					**X**	**X**						
	Manage Voucher Documents	**X**							**X**					
	View Receipts	X		X	X	X								
	View Program Income Accounts	X		X	X	X								
	Block Grant Obligations	X												
	Block Grant Drawdowns	X												
	Block Project Drawdowns	X												
	Block Activity Drawdowns	X												
	View Rates on TA Invoices	X		X		X								
	View TA Invoices	X		X		X								
Compliance	View Flags	X		X	X	X								
	View Monitoring/TA Events	X		X	X	X								
Reports		X	X	X	X	X								

E. Managing Grantee User Accounts

E1. Grantee | Request New User

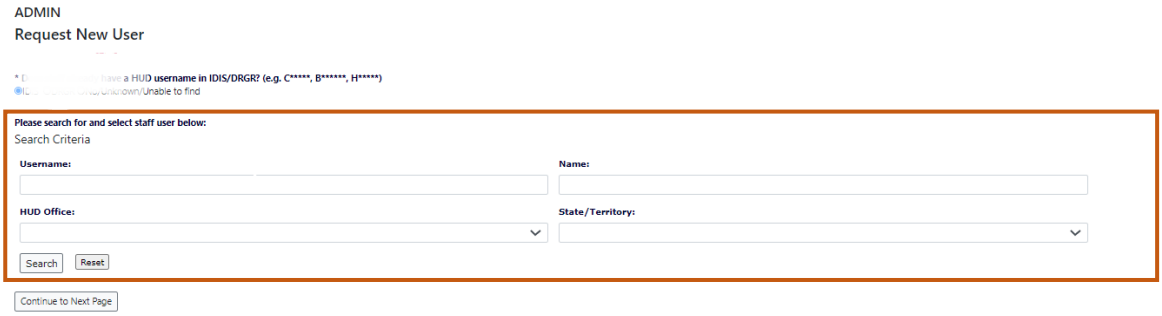
User Role: Grantee User Profile Request	**Menu Option:** Request New Users
Purpose: Allow Grantee Users with the User Profile Request role to Request New Grantee Users.	

Complete the following steps to request a new user be added to the DRGR System:

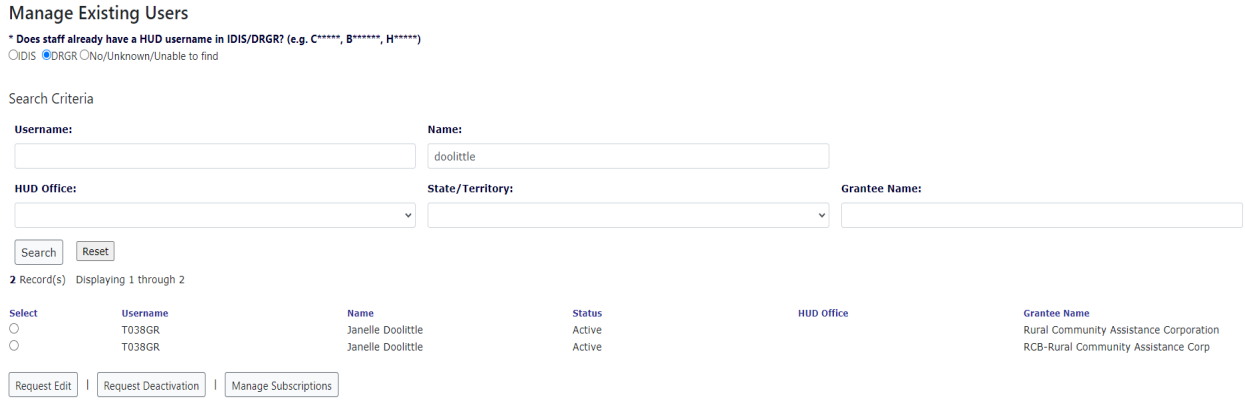
1 Navigate to the **Administration** module, locate the **User Management** menu, select the **<Request New User>** link. See step A1 above. The **"Request New User"** page will load.

2 On the **"Request New User"** page, respond to the question "Does staff already have a HUD username in IDIS/DRGR" and then enter search criteria.

Use the **<Search>** button to determine if the new user has existing User ID in IDIS or DRGR. Be sure to search both IDIS and DRGR before selecting the "No/Unknown/Unable to find" option.



3 To select an existing user in IDIS or DRGR, select the radio button next to the user and select **<Continue to Next Page>**.



User Role: Grantee User Profile Request	**Menu Option:** Request New Users

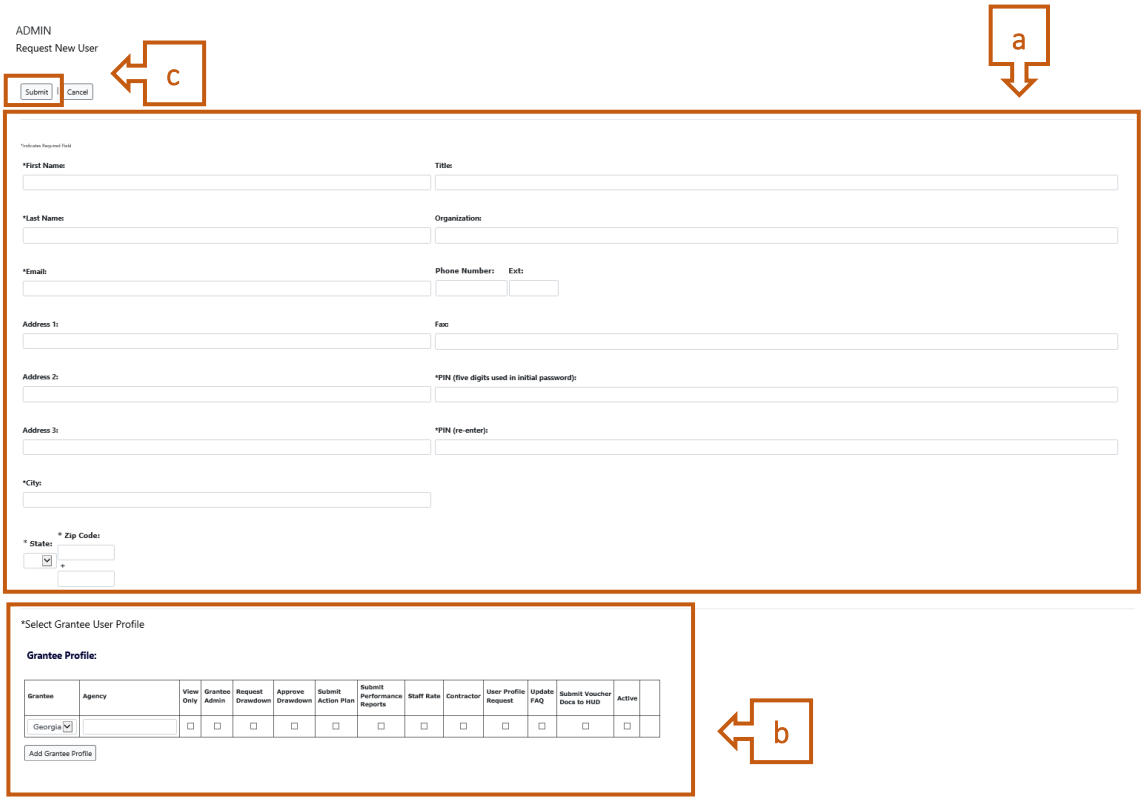
If the search results include no data, select either the "No/Unknown/Unable to find" radio button or select **<Continue to Next Page>**.

4 On the "**Request New User**" page, complete the following steps to populate information on new users:

a. Enter required fields labeled with an (*) asterisk, if not populated. If the new request is for a person who has an account in IDIS or DRGR, information is populated.

b. Select the desired user roles.

c. Select **<Submit>**.



5 The DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users.

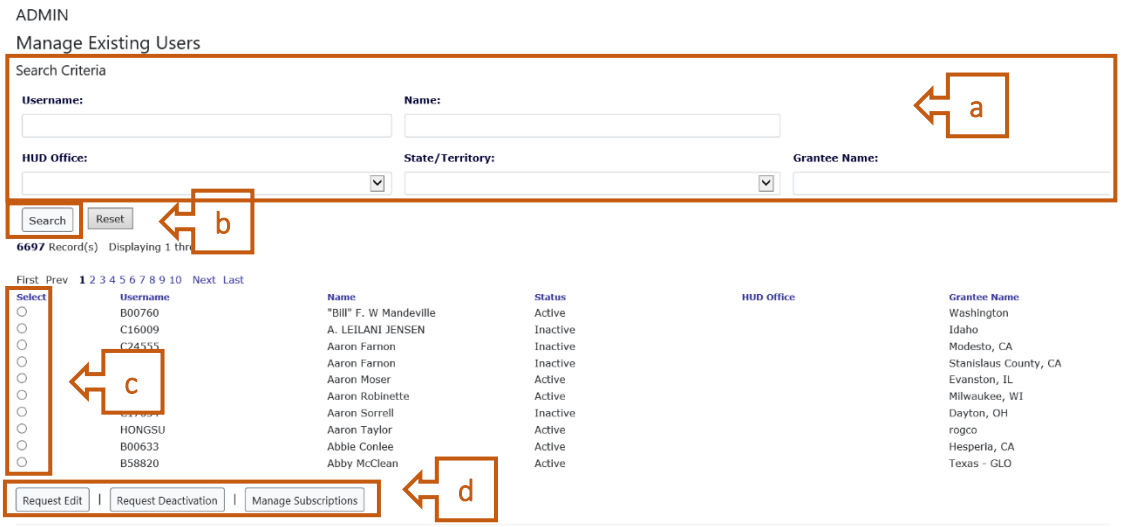
E2. Grantee | Manage Existing User

User Role: Grantee User Profile Request	**Menu Option:** Manage Existing Users
Purpose: Allow Grantee Users with the User Profile Request role to edit/deactivate existing user profiles.	

Complete the following steps to edit or deactivate existing User Profiles:

1. Navigate to the **Administration** module, locate the **User Management** menu, select the **<Manage Existing Users>** link. See step A1 above. The **"Manage Existing Users"** page will load.

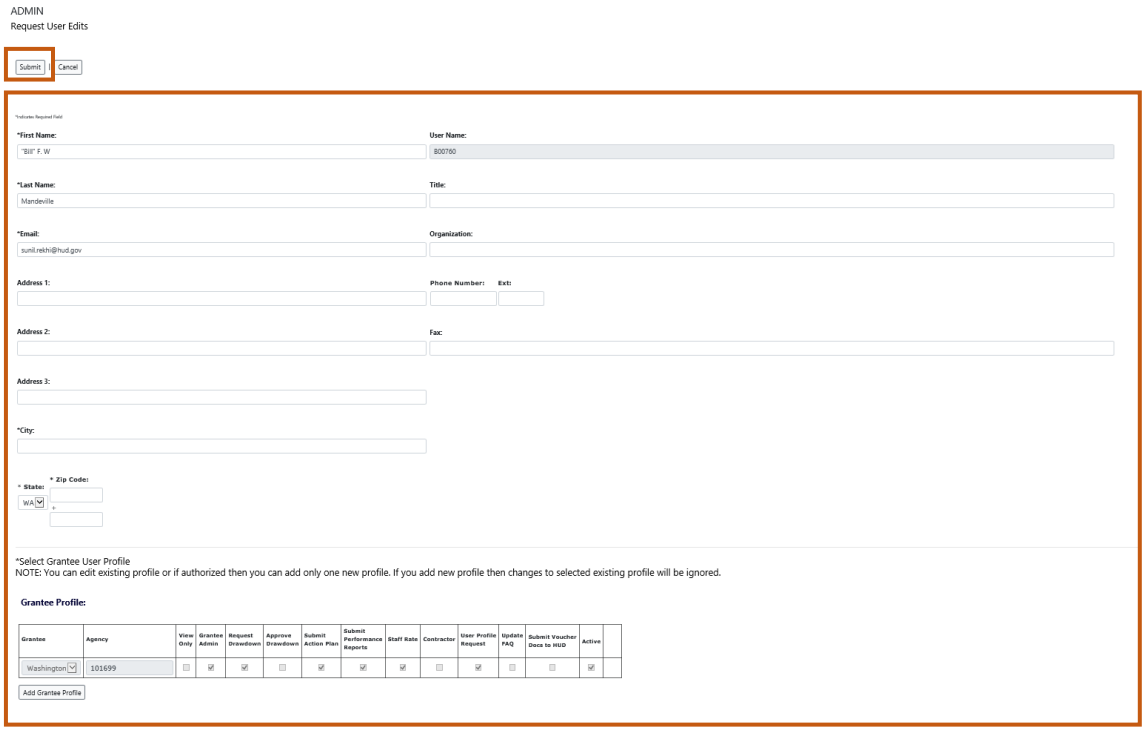
2. To modify information for existing users, follow the steps below:
   a. Enter search criteria.
   b. Select **<Search>**.
   c. Search results will return. Select user using the radio buttons under the Select column.
   d. Choose to the **<Request Deactivation>** or **<Request Edit>** options.



3. If requesting deactivation, select the radio button next to the desired user (see Step 1c) and select **<Request Deactivation>** (see Step 1d). The following page will load. Select **<Submit Deactivation Request>** to complete the process.

User Role: Grantee User Profile Request	**Menu Option:** Manage Existing Users

4 If requesting an edit to an existing user profile, select the radio button next to the desired user (see Step 1c) and select **<Request Edit>** (see Step 1d)**.** The following page will load. Complete the desired edits select **<Submit>**.



5 After completing Step 2 or 3, the DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users.

E3. HUD | Request New User

User Role: HUD User Profile Request	**Menu Option:** Request New Users

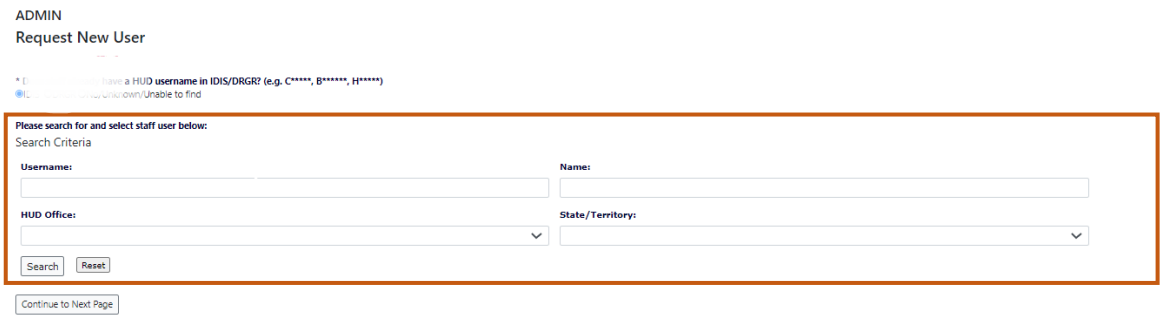
Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to Request New Grantee Users.

Complete the following steps to request a new user be added to the DRGR System:

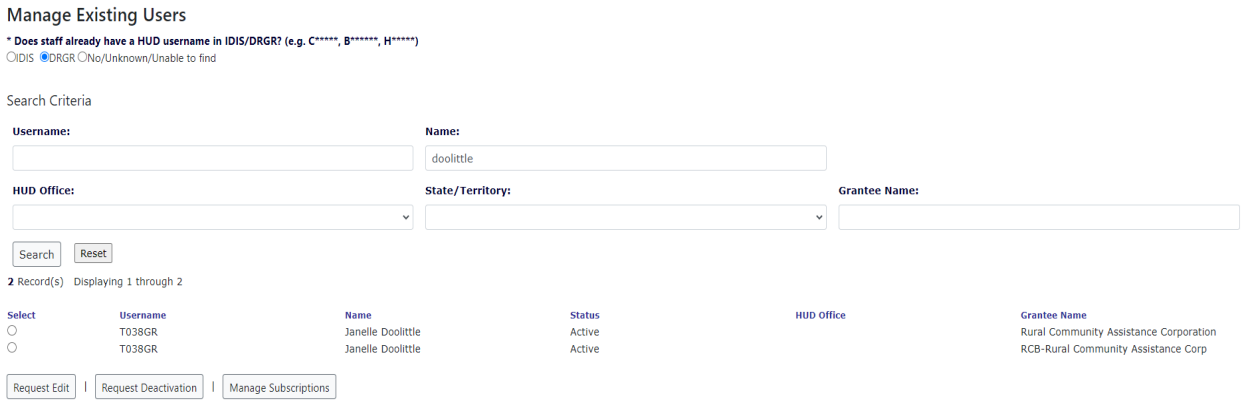
1. Navigate to the **Administration** module, locate the **User Management** menu, select the **<Request New User>** link. See step A2 above. The **"Request New User"** page will load.

2. On the **"Request New User"** page, respond to the question "Does staff already have a HUD username in IDIS/DRGR" and then enter search criteria.

   Use the **<Search>** button to determine if the new user has existing User ID in IDIS or DRGR. Be sure to search both IDIS and DRGR before selecting the "No/Unknown/Unable to find" option.

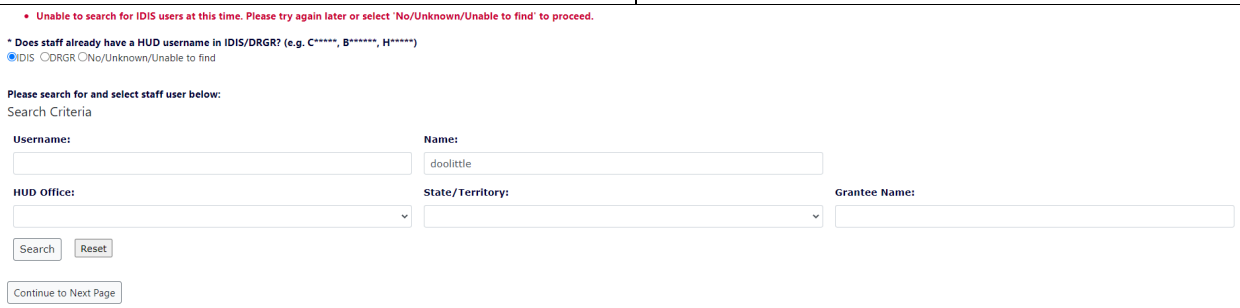


3. To select an existing user in IDIS or DRGR, select the radio button next to the user and select **<Continue to Next Page>**.



   If the search results include no data, select either the "No/Unknown/Unable to find" radio button or select **<Continue to Next Page>**.

User Role: HUD User Profile Request	**Menu Option:** Request New Users

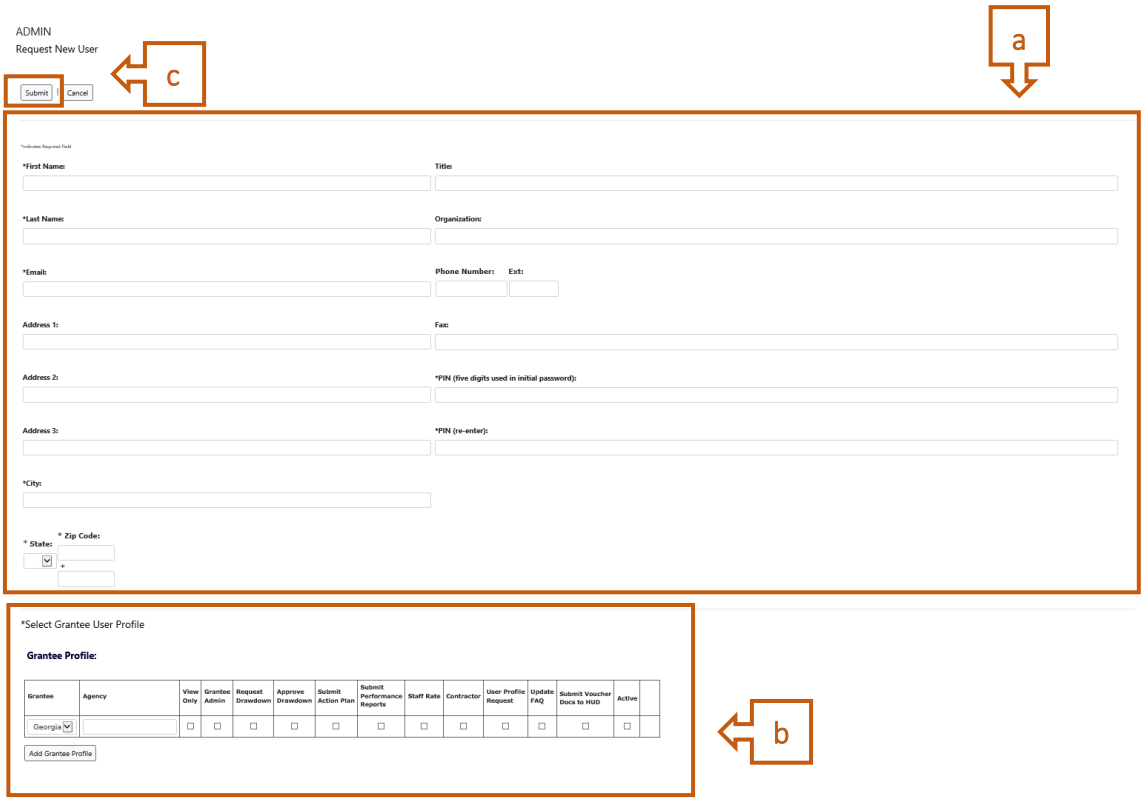


4 On the "**Request New User**" page, complete the following steps to populate information on new users:

a. Enter required fields labeled with an (*) asterisk, if not populated. If the new request is for a person who has an account in IDIS or DRGR, information is populated.

b. Select the desired user roles.

c. Select **<Submit>**.



5 The DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users.

E4. HUD | Manage Existing User

User Role: HUD User Profile Request	**Menu Option:** Manage Existing Users

Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to edit/deactivate existing user profiles.

Complete the following steps to edit or deactivate existing User Profiles:

1 Navigate to the **Administration** module, locate the **User Management** menu, select the **<Manage Existing Users>** link. See step A2 above. The **"Manage New Users"** page will load.

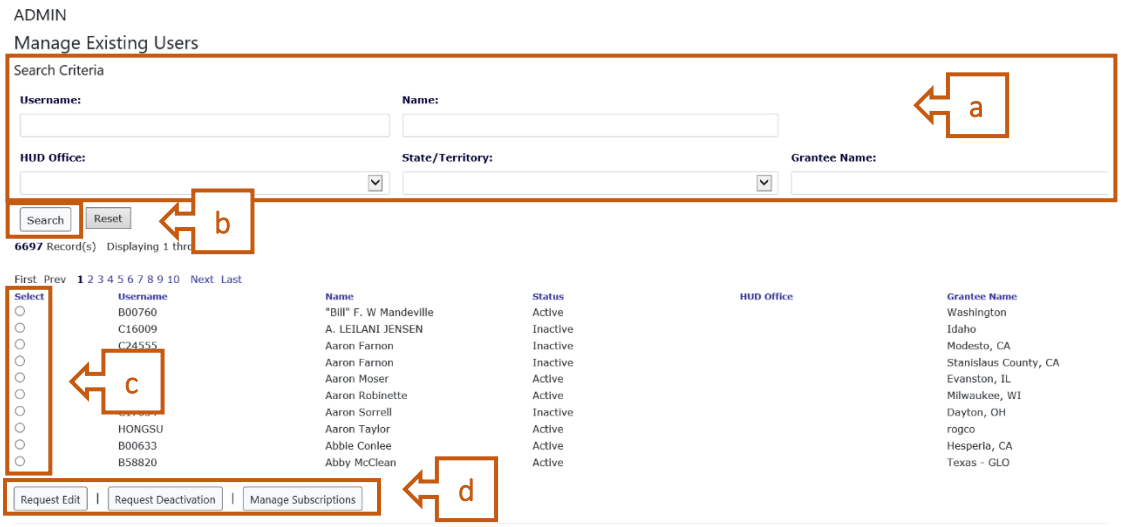
2 To modify information for existing users, follow the steps below:

e. Enter search criteria.

f. Select **<Search>**.

g. Search results will return. Select user using the radio buttons under the "Select" column.

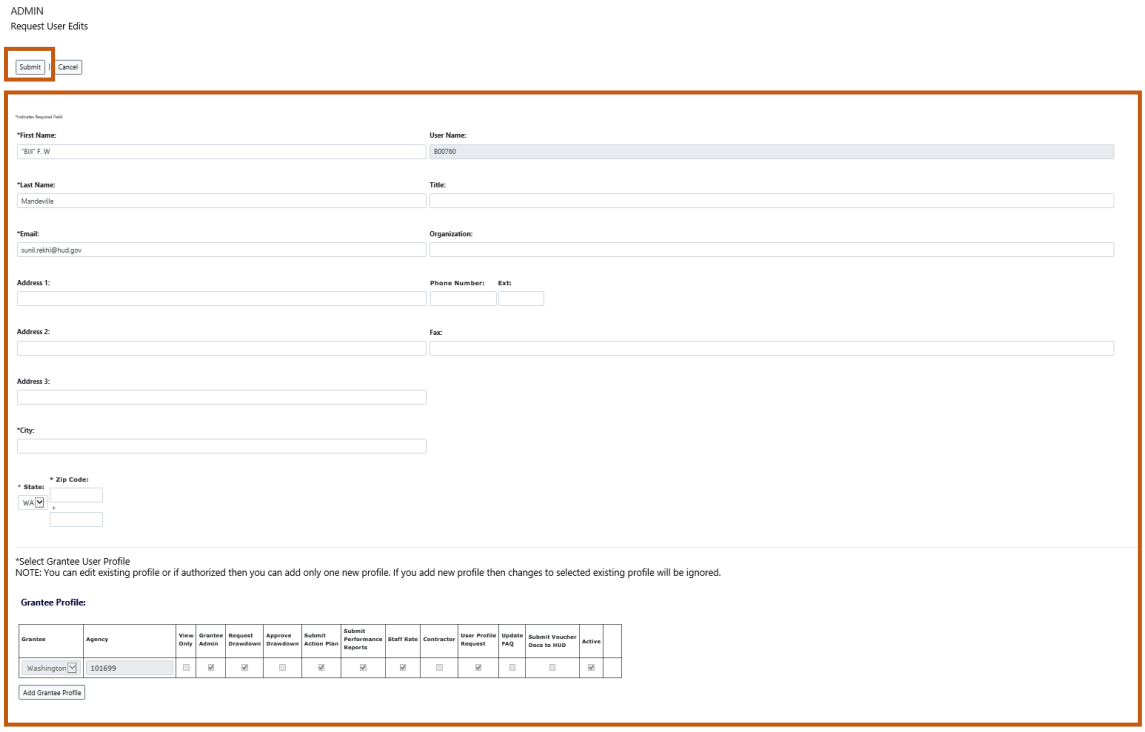
h. Choose to the **<Request Deactivation>** or **<Request Edit>** options.



3 If requesting deactivation, select the radio button next to the desired user (see Step1c) and select **<Request Deactivation>** (see Step 1d). The following page will load. Select **<Submit Deactivation Request>** to complete the process.

User Role: HUD User Profile Request	Menu Option: Manage Existing Users

4 If requesting an edit to an existing user profile, select the radio button next to the desired user (see Step 1c) and select **<Request Edit>** (see Step 1d). The following page will load. Complete the desired edits and select **<Submit>**.



5 After completing Step 2 or 3, the DRGR System will send the request directly to the HUD DRGR Admin for final approval/activation.

E5. HUD | Approve User Request

User Role: HUD User Profile Request	**Menu Option:** Certify Grantee Users Certify Grantee Admin Users

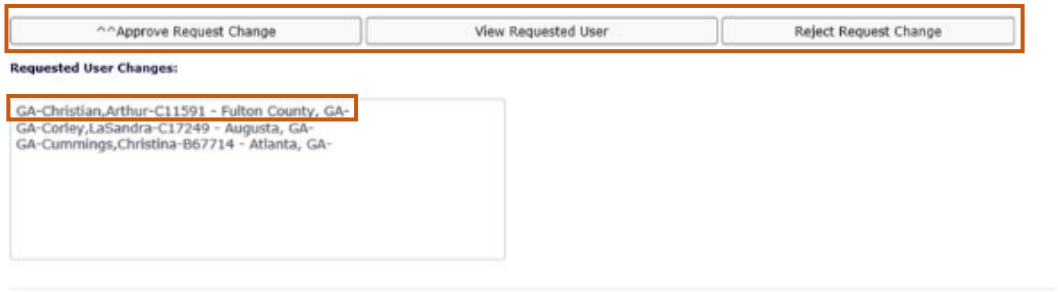
Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to review and approve or reject Grantee user profile requests. Note: There is a different page for approving user requests for Grantee Users versus Grantee Administrators.

Complete the following steps to review and approve or reject user profile requests:

1 Select **<Certify Grantee Users>** or **<Certify Grantee Admin Users>** from the **Administration** menu on the Navigation Bar to load the correct page and review the user profile request (See Section A2, Step 2). The ability to review and approve/reject new user requests (Step 2), edits to existing user profiles (Step 3), or deactivation of existing user profiles (Step 4) appear at the bottom of either page.

2 To view, approve, or reject a new user request, select the desired user profile and then select **<Approve New User>**, **<View Requested User>**, or **<Reject New User>.**

3 To view, approve, or reject an edit user request, select the desired user profile and then select **<Approve Request Change>**, **<View Requested User>**, or **<Reject Request Change>.**



User Role: HUD User Profile Request	**Menu Option:** Certify Grantee Users Certify Grantee Admin Users
4 To view, approve, or reject a user deactivation, select the desired user profile and then select **<Deactivate User>**, **<View Requested User>**, or **<Reject Deactivate>.** 	
5 After completing Step 2, 3, or 4, the DRGR System will send the request to the HUD DRGR Administrator for review and an automated email to the affected Grantee and HUD users.	

E6. HUD | HQ User Request Approvals

The final step is for the HUD DRGR Administrator to approve the user profile request. Once approved, the DRGR System will send an automated email to affected Grantee and HUD users to notify the process is complete.

The remainder of this page is intentionally left blank.

Chapter 6: Responsible Organizations | Administration Module

Chapter 6: Responsible Organizations 1

A. Administration Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Add Responsible Organizations 3

B1. Grantee | Add Responsible Organizations 3

C. Search, Edit, View, and Delete Responsible Organizations 4

C1. Grantee | Search, Edit, View, and Delete Responsible Organizations 4

C2. Grantee | Responsible Organization SAM Validation 6

C3. Grantee | Subordinate Organizations (Optional) 9

C4. HUD | Search and View Responsible Organizations 10

Chapter 6: Responsible Organizations

This Chapter provides procedures for adding and editing Responsible Organizations contained in the **Administration** module. The DRGR System allows for one or more Responsible Organizations by activity in the DRGR action plan. A Responsible Organization is the organization responsible for implementing, or carrying out, the DRGR activity. A Responsible Organization can be the Grantee or a subgrantee. Grantees should only enter each Responsible Organization into DRGR once to avoid creating erroneous duplicates. Once entered, Grantees can associate a Responsible Organization to one or more DRGR activities across all its Grants (see Chapter 14 of the User Manual for more information on activities). Grantees can also optionally associate a Responsible Organization to DRGR projects (see Chapter 12 of the User Manual for more information on projects).

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

Grantee Users

Menu Option	Subsection	Action
Add Responsible Organizations	B1	Add Responsible Organizations
Search Responsible Organizations	C1 – C3	Search Responsible Organizations
Upload Responsible Organizations	--	See Chapter 34: Data Uploads

HUD Users

Menu Option	Subsection	Action
Search/View Responsible Organizations	C4	Search/View Responsible Organizations

A. Administration Module Access

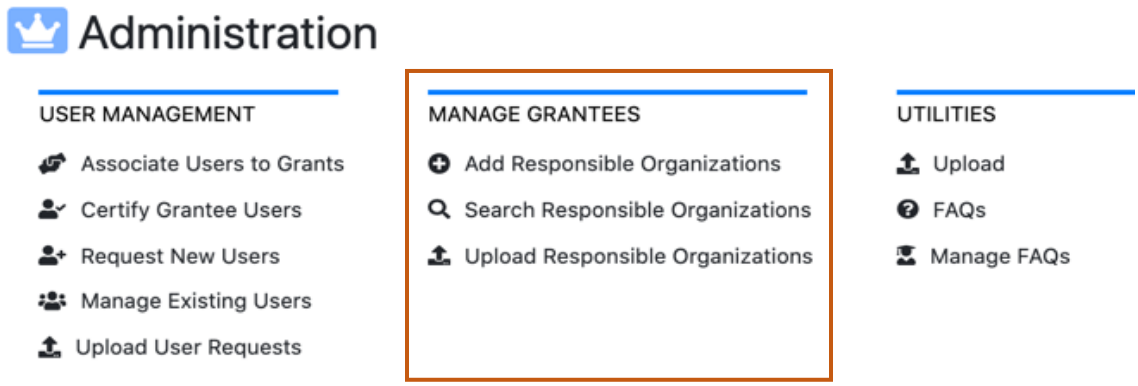
The Administration Module contains all user management functions. The steps in this section explain how to access the main **Administration** module menu. Functions are described in subsequent sections.

A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** **Administration** Module
Purpose: Allow Grantee Users to access "Manage Grantees" actions to add, search, and upload responsible organizations.	
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

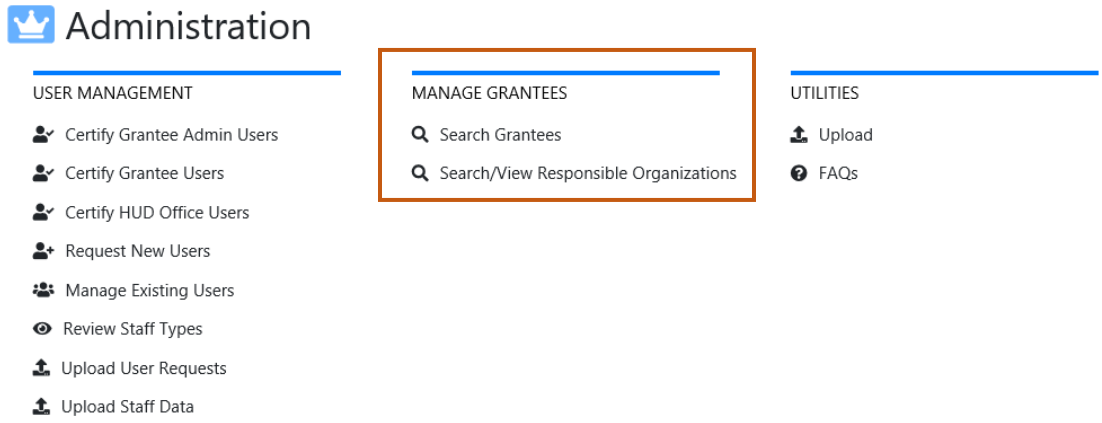
Purpose: Allow HUD Users to access "Manage Grantees" actions to search and view responsible organizations.

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.

User Role: HUD User	Menu Option: Administration Module



B. Add Responsible Organizations

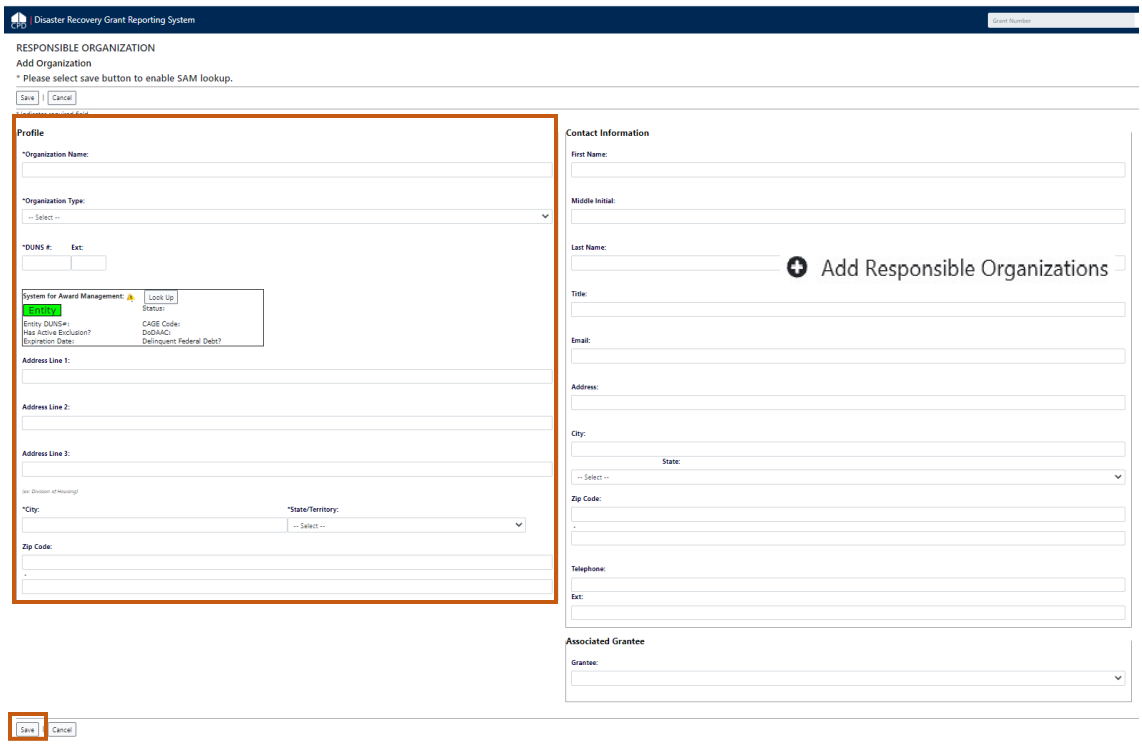
There are two ways to add a Responsible Organization:

- Using the menu option in the **Administration** Module (covered in this Chapter); or
- On the Action Plan **"Add/Edit Activity"** pages (see Chapter 14).

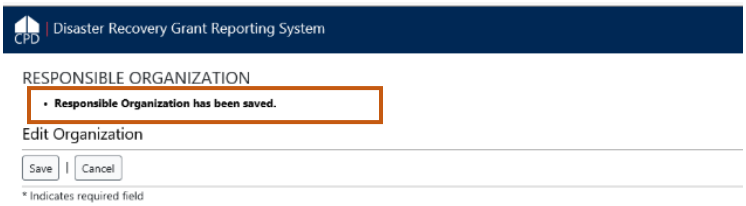
B1. Grantee | Add Responsible Organizations

User Role: Grantee User	Menu Option: Add Responsible Organizations
Purpose: Allow Grantee Users to add Responsible Organizations.	
Complete the following steps to add a new Responsible Organization:	
1 Navigate to the **Administration** module and locate the **Manage Grantees** menu. See A1 above. Select the **<Add Responsible Organizations>** link.	
2 On the **"Responsible Organization"** page, complete, at minimum, the required fields marked with an asterisk (*) and select **<Save>**.	

User Role: Grantee User	**Menu Option:** Add Responsible Organizations



3 The following page will load with a message "Responsible Organization has been saved."



C. Search, Edit, View, and Delete Responsible Organizations

C1. Grantee | Search, Edit, View, and Delete Responsible Organizations

User Role: Grantee User	**Menu Option:** Search Responsible Organizations

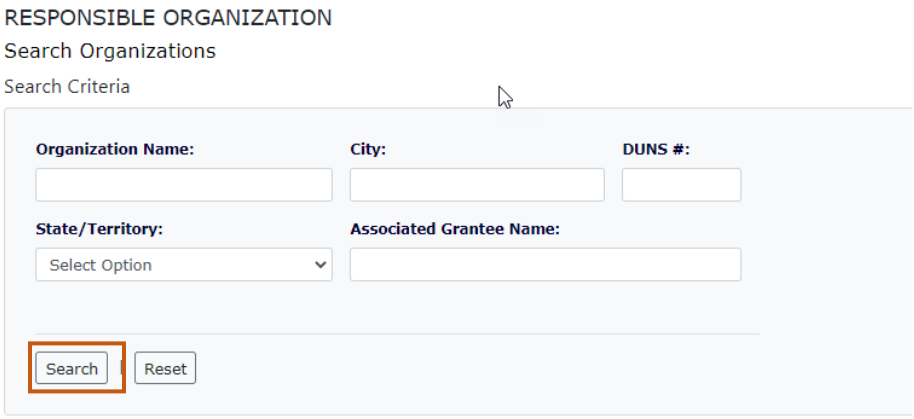
Purpose: Allow Grantee Users to search, edit, view, and delete Responsible Organizations.

Complete the following steps to manage Responsible Organizations:

1 Navigate to the **Administration** module and locate the **Manage Grantees** menu. See A1 above. Select the **<Search Responsible Organizations>** link.

User Role: Grantee User	**Menu Option:** Search Responsible Organizations

2 Enter the search criteria and select **<Search>** or select **<Search>** to load all existing Responsible Organizations in DRGR.



3 Search results will load. Locate the desired Responsible Organization and select an Action on the right (**<Edit>**, **<View>**, or **<Delete>**).

Results Page 1 of 7 (67 Organizations found)

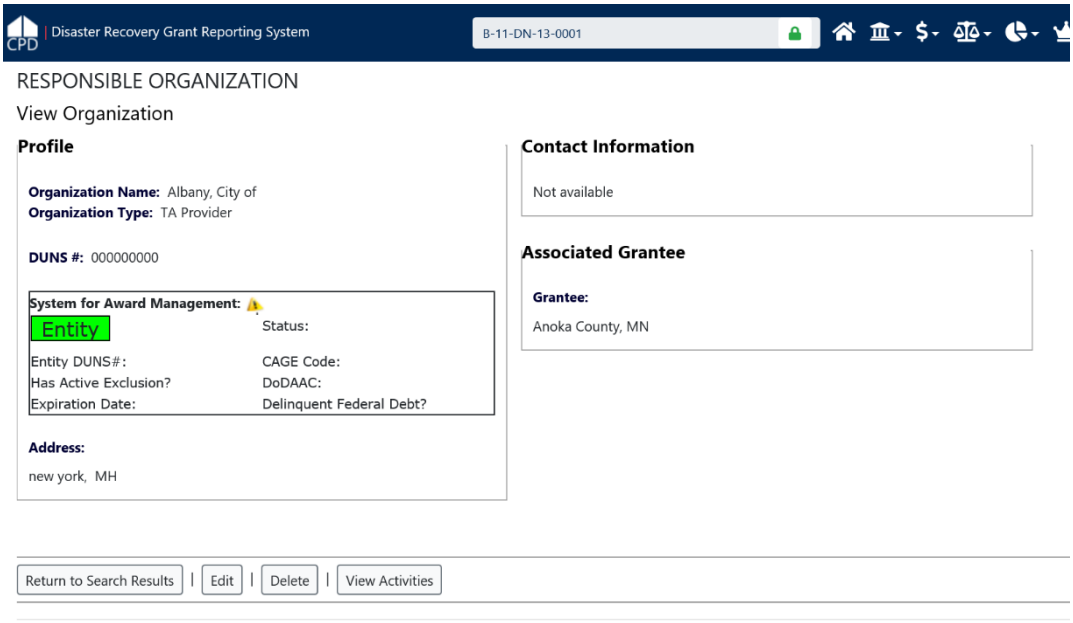
Organization Name	City	State/Territory	DUNS #	Associated Grantee Name	Action
Albany, City of	new york	MH	000000000	Anoka County, MN	Edit | View | Delete
Atlanta, City of			000000000		Edit | View | Delete
Augusta/Richmond County			000000000		Edit | View | Delete
Brunswick, City of	Brunswick	GA	010518199	APD Urban Planning & Management, LI	Edit | View | Delete
Camden County	Woodbine	GA	097392310		Edit | View | Delete
Carroll County/City of Carrollton	Carrollton	GA	075919787		Edit | View | Delete
Carrollton, City of			000000000		Edit | View | Delete
Cartersville, City of			000000000		Edit | View | Delete
Cherokee County			000000000		Edit | View | Delete
Citrus Heights	Citrus Heights	CA	123456789		Edit | View | Delete

4 Selecting **<Delete>** will delete the Responsible Organization so long as the Responsible Organization is not associated with a DRGR activity (see Chapter 14). If a Responsible Organization is associated with an activity, then it cannot be deleted until the association is removed from all activities.

5 Selecting **<Edit>** will load the **"Edit Responsible Organization"** page, which allows existing data to be updated, and allows Grantees to complete the SAM validation (see Section C2) or create a Subordinate Organization (see Section C3).

User Role: Grantee User	**Menu Option:** Search Responsible Organizations

6 Selecting **<View>** will load the **"View Responsible Organization"** page.



C2. Grantee | Responsible Organization SAM Validation

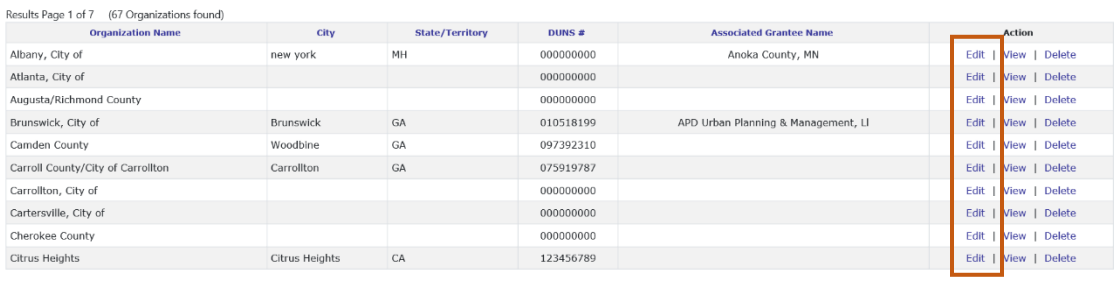
User Role: Grantee User	**Menu Option:** Search Responsible Organizations

Purpose: Allow Grantee Users to validate a Responsible Organization with the System for Award Management (SAM) database (optional but recommended).

Complete the following steps to validate a Responsible Organization with the SAM database:

1 Navigate to the **Administration** module and locate the **Manage Grantees** menu. See A1 above. Select the **<Search Responsible Organizations>** link.

2 After entering search criteria and selecting **<Search>**, select **<Edit>** next to the desired Responsible Organization.

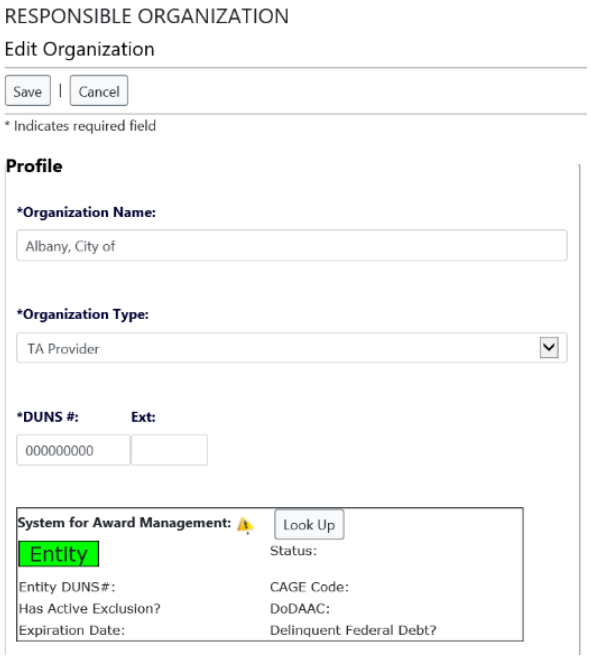


Results Page 1 of 7 (67 Organizations found)

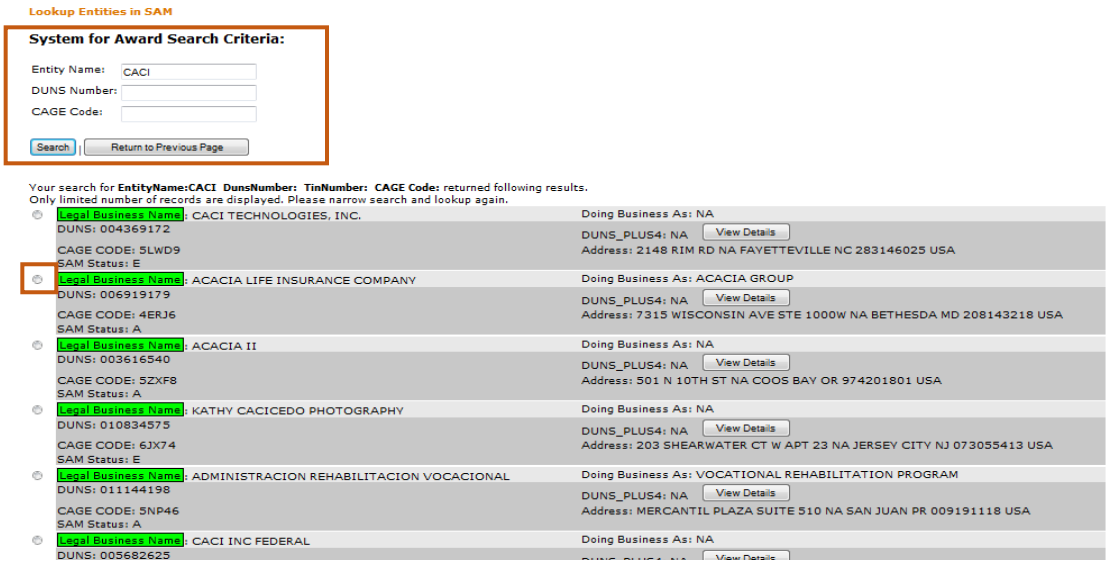
Organization Name	City	State/Territory	DUNS #	Associated Grantee Name	Action
Albany, City of	new york	MH	000000000	Anoka County, MN	Edit | View | Delete
Atlanta, City of			000000000		Edit | View | Delete
Augusta/Richmond County			000000000		Edit | View | Delete
Brunswick, City of	Brunswick	GA	010518199	APD Urban Planning & Management, LI	Edit | View | Delete
Camden County	Woodbine	GA	097392310		Edit | View | Delete
Carroll County/City of Carrollton	Carrollton	GA	075919787		Edit | View | Delete
Carrollton, City of			000000000		Edit | View | Delete
Cartersville, City of			000000000		Edit | View | Delete
Cherokee County			000000000		Edit | View | Delete
Citrus Heights	Citrus Heights	CA	123456789		Edit | View | Delete

User Role: Grantee User	**Menu Option:** Search Responsible Organizations

3 Select **<Look Up>** next to the "System for Award Management" heading.

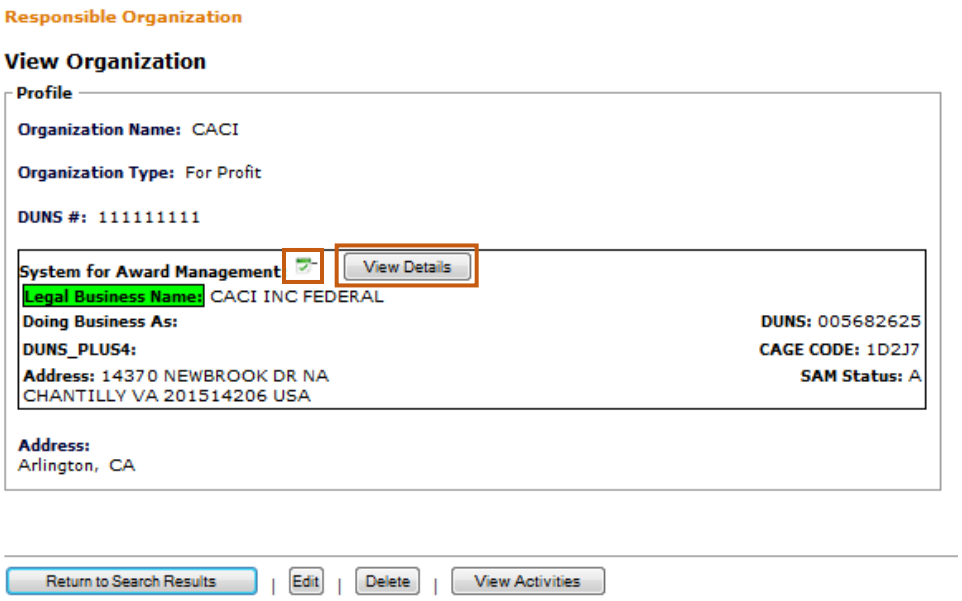


4 Enter search criteria and select **<Search>**. To associate the Responsible Organization with SAM data, select the radio button next to the desired search result and select **<Return to Previous Page>**.

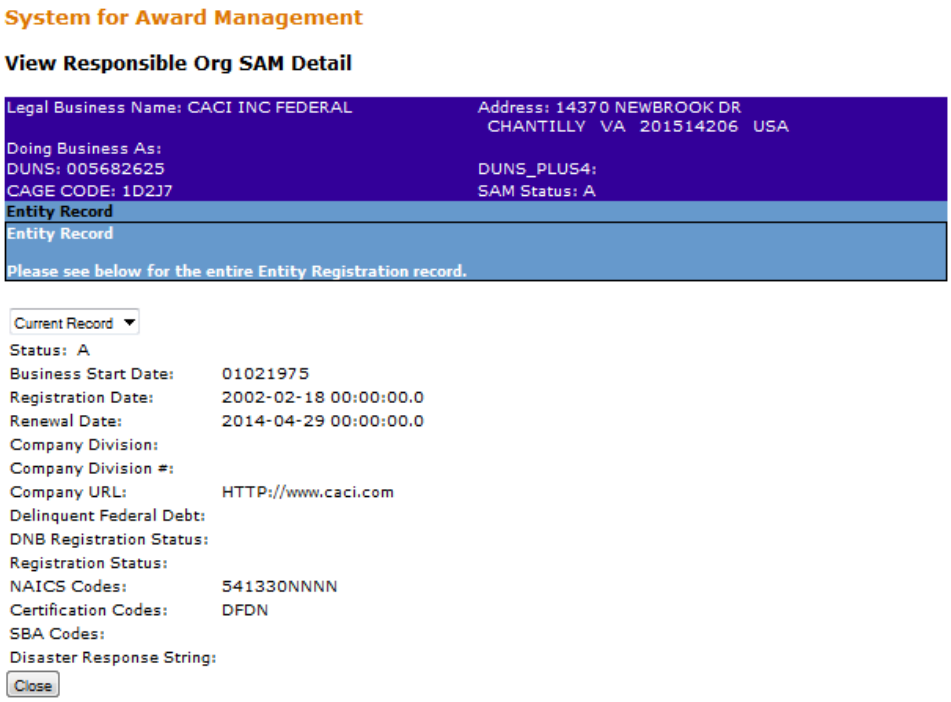


User Role: Grantee User	Menu Option: Search Responsible Organizations

5 The **"View Organization"** page will load. A checkmark will appear next to "System for Award Management" if the Responsible Organization was successfully associated with the SAM database.



6 Optional: Select **<View Details>** to view the following (see Step 4 above):



C3. Grantee | Subordinate Organizations (Optional)

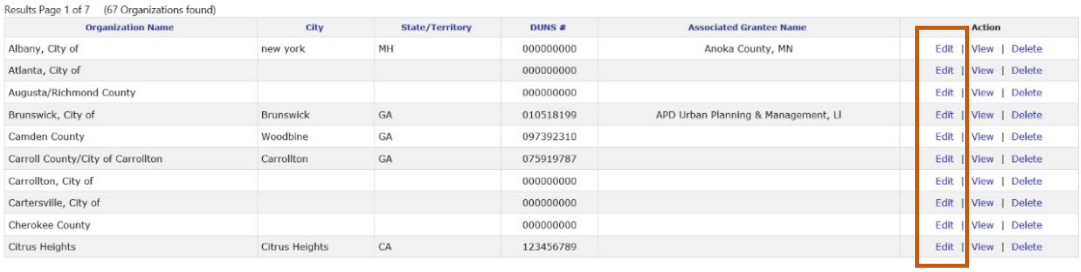
User Role: Grantee Administrator	**Menu Option:** Search Responsible Organizations

Purpose: Allow other Grantee Users (outside of the organization) that already have DRGR accounts to access and view/edit DRGR pages for activities in which they are the Responsible Organization.

Complete the following steps to associate Subordinate Users to Grants:

1 Navigate to the **Administration** module and locate the **Manage Grantees** menu. See A1 above. Select the **<Search Responsible Organizations>** link.

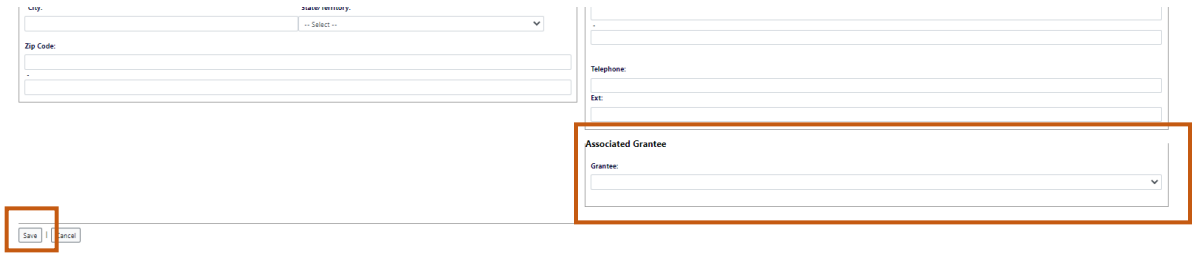
2 After entering search criteria and selecting **<Search>**, select **<Edit>** next to the desired Responsible Organization.



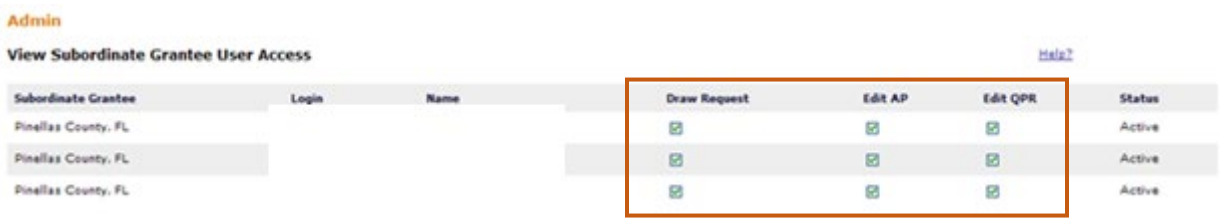
Results Page 1 of 7 (67 Organizations found)

Organization Name	City	State/Territory	DUNS #	Associated Grantee Name	Action
Albany, City of	new york	MH	000000000	Anoka County, MN	Edit | View | Delete
Atlanta, City of			000000000		Edit | View | Delete
Augusta/Richmond County			000000000		Edit | View | Delete
Brunswick, City of	Brunswick	GA	010518199	APD Urban Planning & Management, LI	Edit | View | Delete
Camden County	Woodbine	GA	097392310		Edit | View | Delete
Carroll County/City of Carrollton	Carrollton	GA	075919787		Edit | View | Delete
Carrollton, City of			000000000		Edit | View | Delete
Cartersville, City of			000000000		Edit | View | Delete
Cherokee County			000000000		Edit | View | Delete
Citrus Heights	Citrus Heights	CA	123456789		Edit | View | Delete

Scroll to the bottom right of the page and locate the "Associate Grantee" box. Select a Grantee from the dropdown menu and select **<Save>**.



3 From the **"Manage Subordinate Organizations"** page, select which edit privileges (roles) to give to Grantee Users in the selected Subordinate Grantee.



Admin

View Subordinate Grantee User Access

Help?

Subordinate Grantee	Login	Name	Draw Request	Edit AP	Edit QPR	Status
Pinellas County, FL			☑	☑	☑	Active
Pinellas County, FL			☑	☑	☑	Active
Pinellas County, FL			☑	☑	☑	Active

C4. HUD | Search and View Responsible Organizations

User Role: HUD User	**Menu Option:** Search/View Responsible Organizations

Purpose: Allow HUD Users to search and view Responsible Organizations.

Complete the following steps to search and view a Responsible Organization:

1 Navigate to the **Administration** module and locate the **Manage Grantees** menu. See Section A2 above. Select the **<Search Responsible Organizations>** link.

2 Enter the search criteria and select **<Search>** or select **<Search>** to load all existing Responsible Organizations in DRGR. Locate the desired Responsible Organization and select **<View>** under the "Action" heading.

Results Page 1 of 1,508 (15,077 Organizations found)

HUD Office	Grantee Name	Associated Grantee Name	Organization Name	City	State/Territory	DUNS #	Action
DENVER	North Dakota-DOC		-			000000000	View
GREENSBORO	Chapel Hill, NC		-			000000000	View
SAN FRANCISCO	Sacramento, CA		-			000000000	View
MANCHESTER	Maine		-			000000000	View
CARIBBEAN	Toa Alta Municipio, PR		-			000000000	View
BOSTON	Maine		-			000000000	View
HUD HEADQUARTERS	Kentucky		101 Counties			000000000	View
LOUISVILLE	Kentucky		101 Counties			000000000	View
LOUISVILLE	Kentucky		101 counties and 2 cities			000000000	View
HUD HEADQUARTERS	Kentucky		101 counties and 2 cities			000000000	View

3 The **"View Responsible Organization"** page will load.

CPD | Disaster Recovery Grant Reporting System B-11-DN-13-0001

RESPONSIBLE ORGANIZATION

View Organization

Profile

Organization Name: Albany, City of
Organization Type: TA Provider

DUNS #: 000000000

System for Award Management:
Entity
Status:
Entity DUNS#:
CAGE Code:
Has Active Exclusion?
DoDAAC:
Expiration Date:
Delinquent Federal Debt?

Address:
new york, MH

Contact Information

Not available

Associated Grantee

Grantee:
Anoka County, MN

Return to Search Results | Edit | Delete | View Activities

Chapter 7: My Profile

Chapter 7: My Profile 1

A. Access My Profile 1

A1. Grantee and HUD | Access My Profile 1

B. Logout 2

B1. Grantee and HUD | Logout 2

C. Manage My Account 3

C1. Grantee and HUD | Manage My Account 3

D. Grantee and HUD | Manage My Subscriptions 6

D1. Grantee and HUD | Manage My Subscriptions 6

D2. Grantee and HUD | List of Available Subscriptions 9

E. Grantee and HUD | Switch Profile 10

E1. Grantee and HUD | Switch Profile 10

Chapter 7: My Profile

This Chapter provides procedures for the functions under **My Profile**. **My Profile** functions allow users to view his/her roles and associated grantee profile(s), make requests for changes to the profile contact information, manage subscriptions, logout of DRGR, and, for users with access to more than one Grantee, switch profiles.

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

Grantee Users and HUD Users

Menu Option	Subsection	Action
My Profile	A	Access My Profile menu
Logout	B	Logout
Manage My Account	C	Request edits to profile information and check user roles
Manage My Subscriptions	D	Edit subscription preferences by opting in or out of subscriptions
Switch Profile	E	For users with access to multiple Grants, switch profiles

A. Access My Profile

The **My Profile** module includes the **<Logout>**, **<Manage My Profile>**, and **<Manage My Subscription>** functions for all users. For users with access to multiple Grants, the **My Profile** functions also include a link to **<Switch Profiles>**.

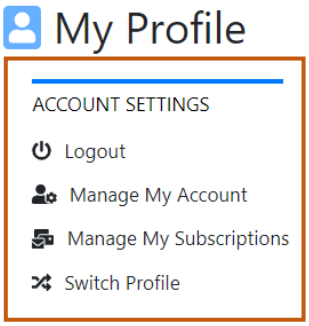
A1. Grantee and HUD | Access My Profile

User Role: Grantee User and HUD User	**Menu Option:** **My Profile**
Purpose: Allow Grantee Users and HUD Users access to functions under **My Profile**.	

Complete the following steps to access My Profile:

1 In the DRGR System, select the **My Profile** module, or icon, located in the navigation menu.

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

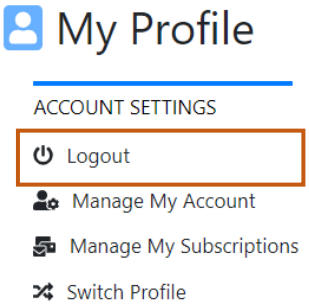


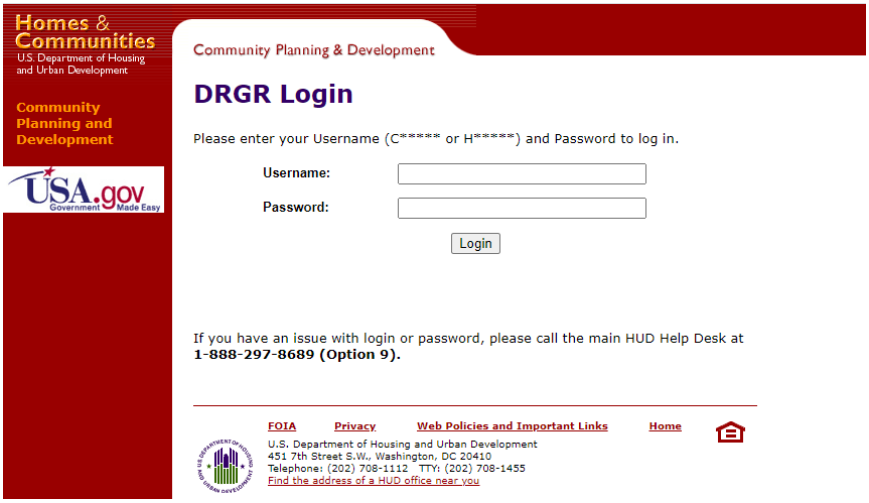
B. Logout

It is important for both Grantee users and HUD users to logout of DRGR using the **<Logout>** link under **My Profile**. Ending a DRGR session by closing the browser or letting the session expire due to lack of action over a twenty (20) minute period does NOT securely end the session and will cause a user to be locked out of its account for up to a thirty (30) minutes. The following subsection explains how to logout of DRGR properly.

TIP! Any user locked out of DRGR for more than thirty minutes can e-mail DRGRHelp@hud.gov and ask for a "Session reset."

B1. Grantee and HUD | Logout

User Role: Grantee User and HUD User	**Menu Option:** Logout
Purpose: Allow Grantee Users and HUD Users to log out securely from DRGR.	
Complete the following steps to logout securely from DRGR:	
1 In the **My Profile** menu, select **<Logout>**. 	
2 This ends the DRGR session securely and redirects the user to the **"Login"** page.	

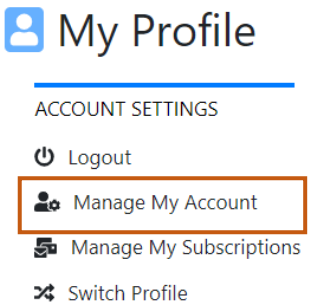


C. Manage My Account

C1. Grantee and HUD | Manage My Account

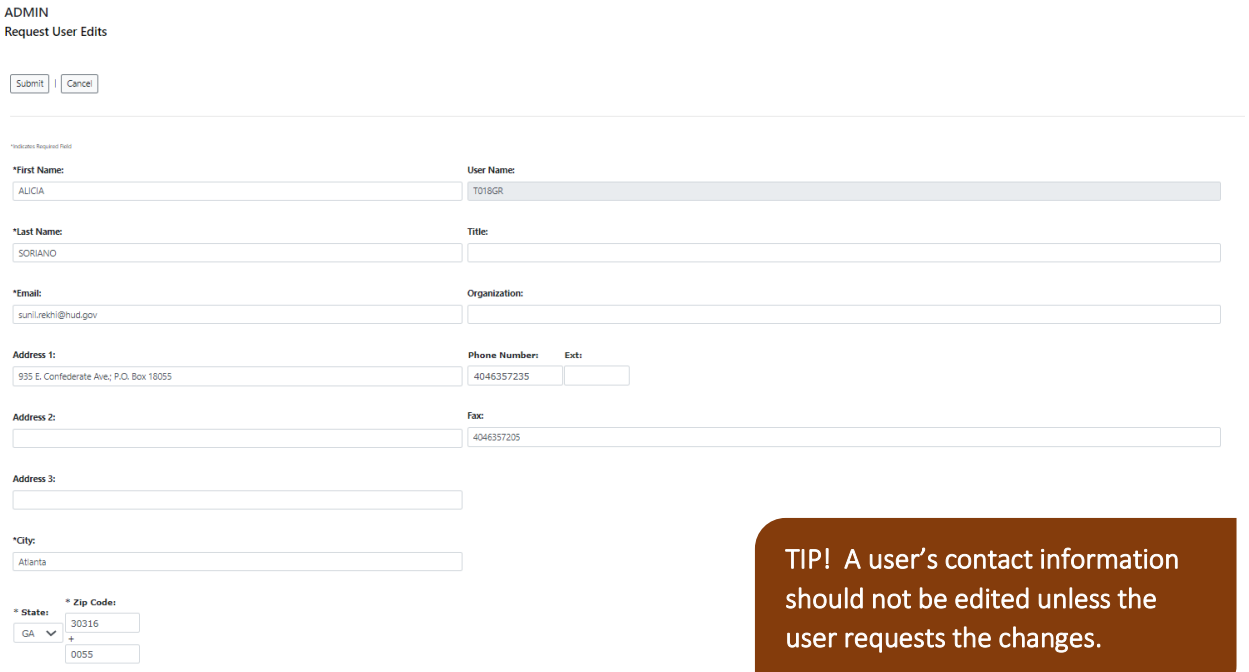
User Role: Grantee User and HUD User	**Menu Option:** Manage My Account
Purpose: Allow Grantee Users to request edits to contact information and check user roles.	
Complete the following steps to update contact information and check user roles.	

1 In the **My Profile** menu, select **<Manage My Account>**.



The remainder of this page is intentionally left blank.

2 On the **"Manage My Account"** page, users can edit contact information, however, changes to user's first and last name, user name, and profile rights require DRGR Administrator approval. Information marked with an asterisk is mandatory.



TIP! A user's contact information should not be edited unless the user requests the changes.

3 Once information is updated, users select **<Submit>** to save information.

The remainder of this page is intentionally left blank.

4 To check user roles assigned to a user's account, the user may scroll down on the **"Manage My Account"** page to review the assigned user roles. More information on user roles can be found in Chapter 5 – User Management and Certifications. In the Grantee example below, this user has the "Request Drawdown", "Submit Action Plan", "Submit Performance Reports", "User Profile Request", and "Update FAQ roles." This view also shows that the user's account is Active. NOTE: The Staff Rate Role is applicable to TA Providers only. The Update FAQ role is applicable to HUD staff only.

EX. GRANTEE PROFILE -

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active
Georgia	28	☐	☐	☑	☐	☑	☑	☐	☐	☑	☑	☐	☑

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

Comments:

Submit | Cancel

EX. HUD PROFILE:

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

HUD Profile:

HUD Office	HUD Program	View Only	HQ Admin	Super User	Approve Drawdown	User Profile Request	Update FAQ	Office of Inspector General	Active
LOS ANGELES	100226	☐	☐	☐	☐	☑	☐	☐	☑

Grantee Profile:

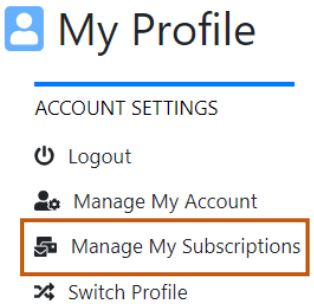
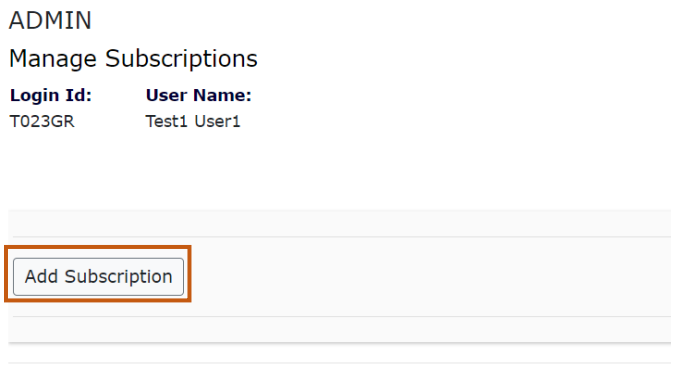
Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

The remainder of this page is intentionally left blank.

D. Grantee and HUD | Manage My Subscriptions

Grantee Users and HUD Users may opt in or out of subscriptions that provide alerts when certain actions are completed in DRGR. See subsection D2 for a list of subscriptions available in the System.

D1. Grantee and HUD | Manage My Subscriptions

User Role: Grantee User and HUD User	**Menu Option:** Manage My Subscriptions
Purpose: Allow Grantee Users and HUD Users to edit subscription preferences.	
Complete the following steps to edit subscription preferences:	
1 In the "**My Profile**" menu, select **<Manage My Subscriptions>**. 	
2 A new page will load. Select **<Add Subscription>**. 	

The remainder of this page is intentionally left blank.

3 A new **"Add Subscriptions"** page will load, and users can make preferences for managing their subscriptions. Users can:

(a) set a custom subscription name;

(b) choose the event that they would like to be notified about from the dropdown list of options;

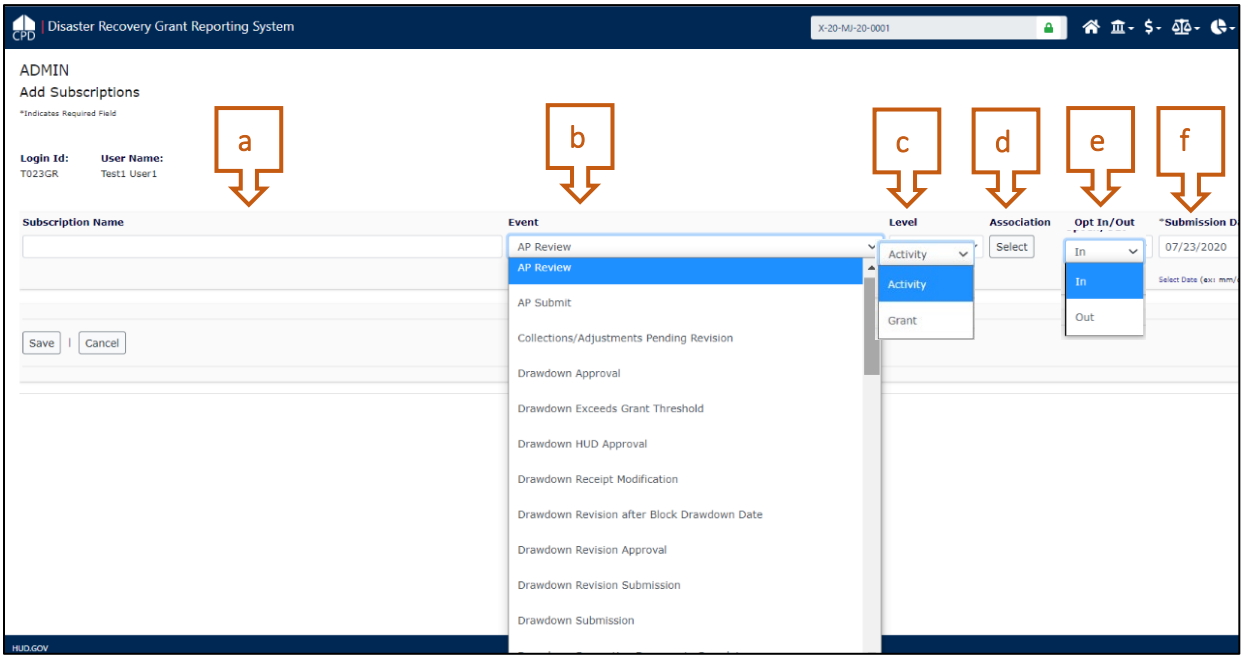
(c) select whether subscriptions will be delivered for an Activity or a Grant from the **<Level>** dropdown field;

(d) choose the Activity or Grant with which the subscription should be associated by clicking on **<Select>**;

(e) opt in or out of the subscription from the dropdown field; and

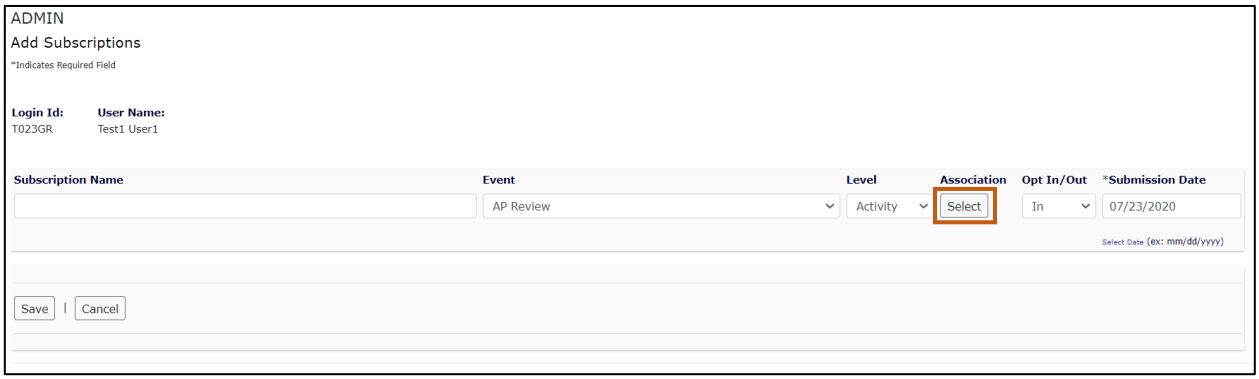
(f) set the start of the subscription period.

Note: The list of available subscriptions is provided at subsection D2 below.

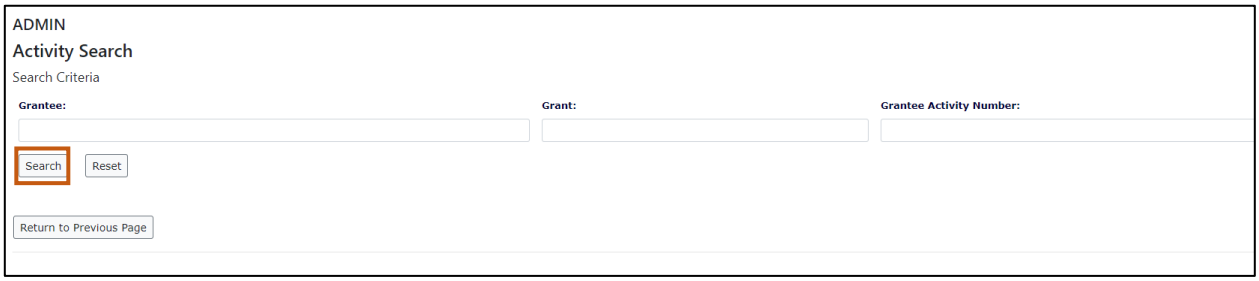


The remainder of this page is intentionally left blank.

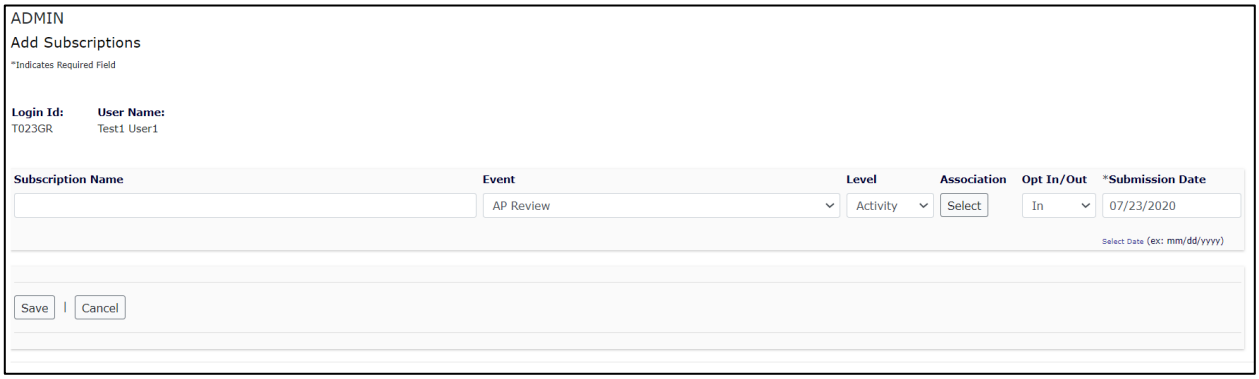
4 When selecting the Activity or Grant to which the subscription will be applied (step 3d above), click on **<Select>** to search the Activities or Grants.



5 A new **"Activity Search"** page will load. On this page, users may enter information to refine their search or leave the fields blank and simply select **<Search>**. A list of Activities or Grants will be returned from which the user may select.



6 After the user has populated all fields on the **"Add Subscriptions"** page, select **<Save>** to activate the subscription.



D2. Grantee and HUD | List of Available Subscriptions

The following is the list of available subscriptions on the **"Add Subscriptions"** page under **Manage My Subscriptions**. By adding a subscription for one or more of these actions, users will be notified when activity occurs on these functions.

AP Review
AP Submit
Collections/Adjustments Pending Revision
Drawdown Approval
Drawdown Exceeds Grant Threshold
Drawdown HUD Approval
Drawdown Receipt Modification
Drawdown Revision after Block Drawdown Date
Drawdown Revision Approval
Drawdown Revision Submission
Drawdown Submission
Drawdown Supporting Documents Complete
Drawdown Supporting Documents InComplete
Drawdown Supporting Documents Request
Drawdown Supporting Documents Review Request
Drawdown Supporting Documents Submit
Drawdown Supporting Documents Undo
Grant Checklist Approve
Grant Checklist Reject
Grant Checklist Submit
New User Request completed
New User Request pending HQ completion
New User Request pending review
New User Request rejected
New User Request rejected by HQ
QPR Review
QPR Submit
Receipt Creation
Staff Rate Approve
Staff Rate Reject
Staff Rate Submit
TA Work Plan Approve
TA Work Plan Submit
TA Workplan Reject
Update User Request completed
Update User Request pending HQ completion
Update User Request pending review
Update User Request rejected by HQ
User Deactivation Request completed
User Deactivation Request pending HQ completion
User Deactivation Request pending review
User Deactivation Request rejected
User Deactivation Request rejected by HQ

The remainder of this page is intentionally left blank.

E. Grantee and HUD | Switch Profile

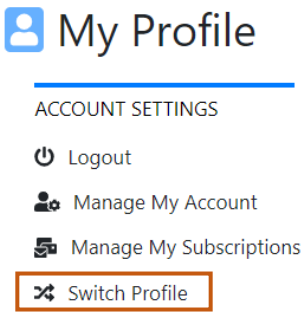
E1. Grantee and HUD | Switch Profile

In DRGR, users may have access to multiple Grants and, therefore, multiple profiles.

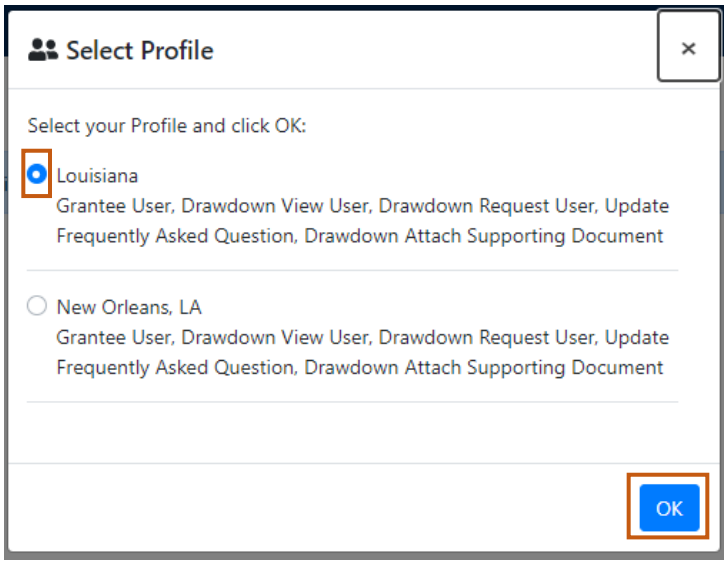
User Role: Grantee and HUD User	**Menu Option:** Switch Profile
Purpose: Allow Grantee and HUD Users to switch between DRGR profiles.	

Complete the following steps to switch between profiles:

1 In the **My Profile** menu, select **<Switch Profile>**.



2 The **"Select Profile"** box will display. Choose the desired profile and select **<OK>**.



Note: The HUD approved roles associated with each profile are included in the "Select Profile" window. The list may not include pending roles.

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.

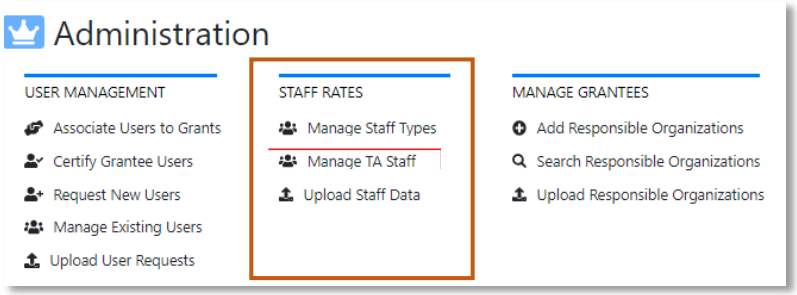
A1. Grantee | User Access

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

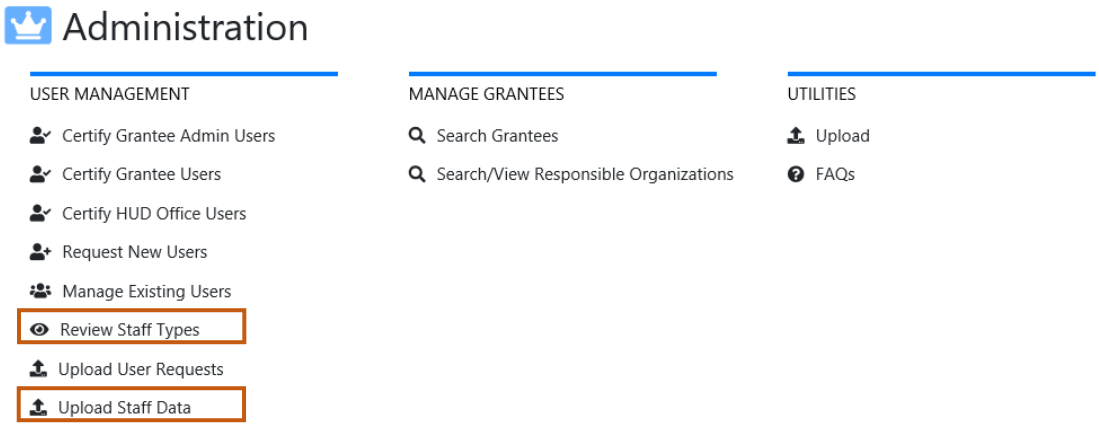
User Role: HUD User	**Menu Option:** Administration Module
Purpose: Allow HUD Users to access Staff Rate actions.	

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.



B. Manage Staff Types

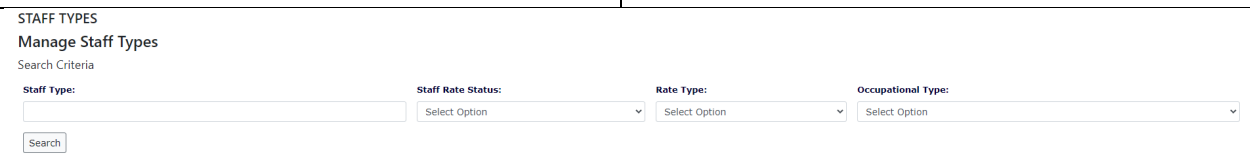
The System allows authorized users of TA Providers to add, edit, delete, view, and search for Staff Types and Rates, which require HUD approval. Authorized users may also view HUD comments on staff types. These actions are completed using the **<Manage Staff Types>** link in the **Administration** module.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

B1. TA Provider and HUD Users| Search Staff Type

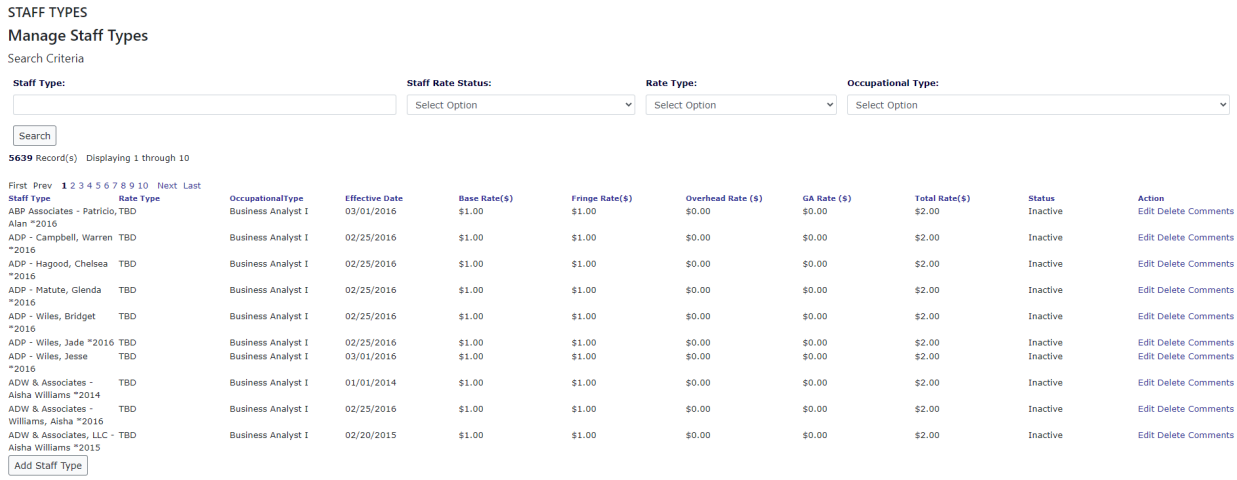
Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role), as well as, CPD Representatives assigned to an award can search for rates associated with that award in DRGR.

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



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.



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

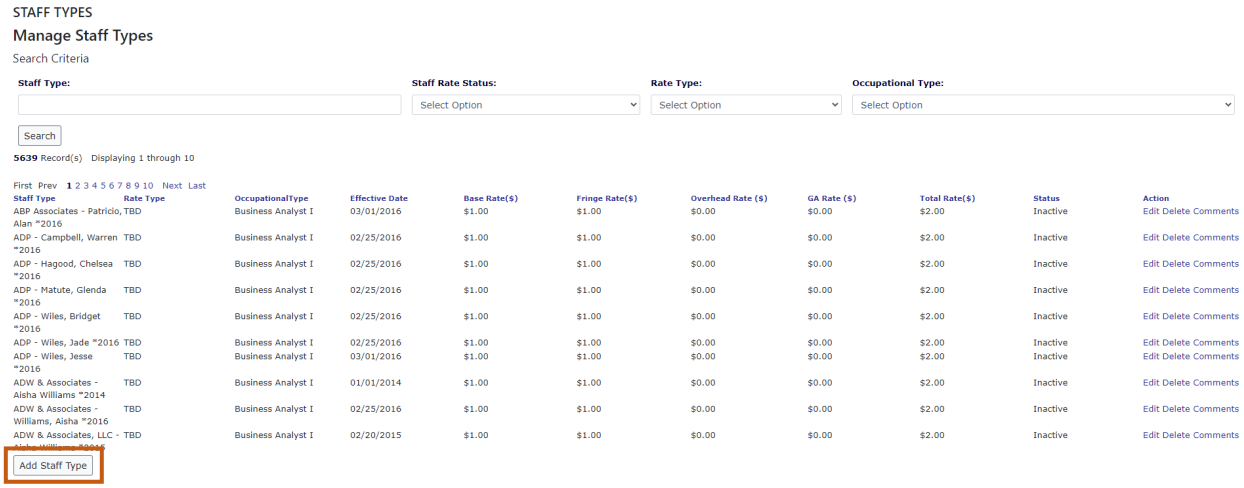
https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance.

User Role: Grantee User	**Menu Option:** Manage Staff Types
Purpose: Allow TA Provider to add Staff Types.	

Complete the following steps to add a new Staff Type:

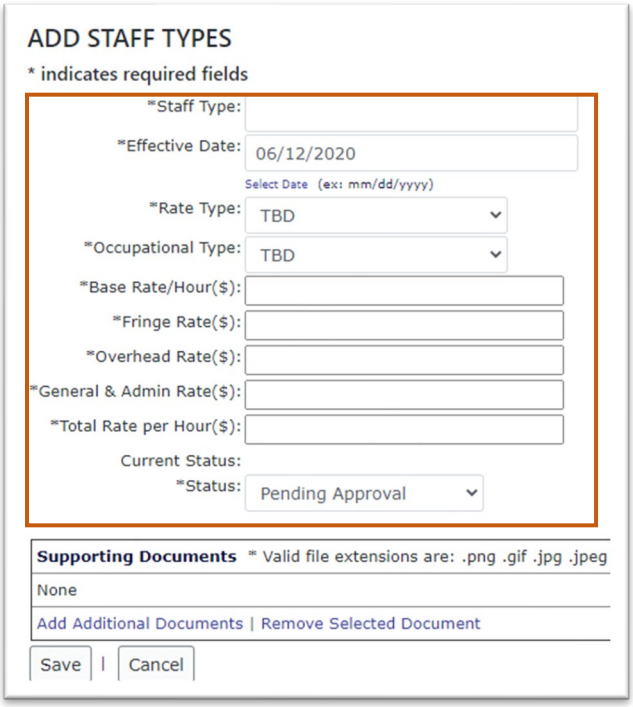
1 To add a Staff Type, navigate to the **Administration** module, locate the **Staff Rate** menu, and locate the **Staff Rates** menu. See A1 above. Select the **<Manage Staff Types>** link. (Note: If the user does not have the Staff Rate role, then the **<Manage Staff Types>** link is not available.) The **"Manage Staff Types"** page will load.

2 On the **"Manage Staff Types"** page, select the **<Add Staff Type>** link. The **"Add Staff Types"** page will load.

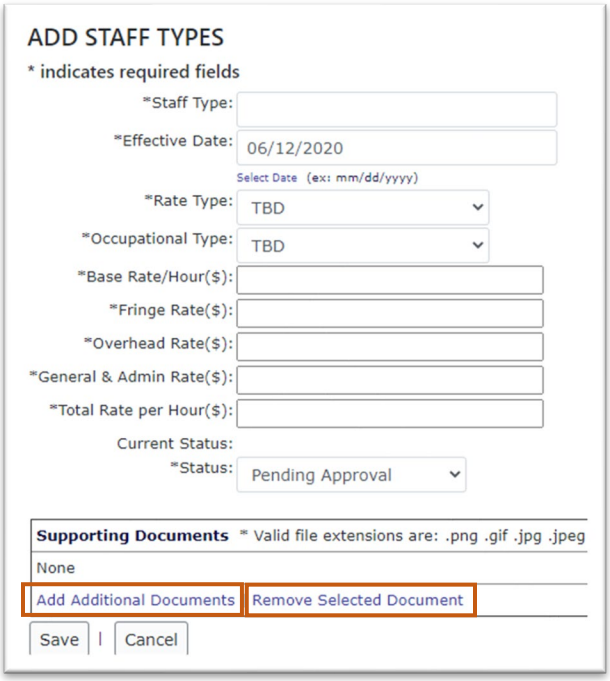


3 On the **"Add Staff Types"** page, complete all information marked with an asterisk. See chart below for guidance on completing these fields.

User Role: Grantee User	Menu Option: Manage Staff Types

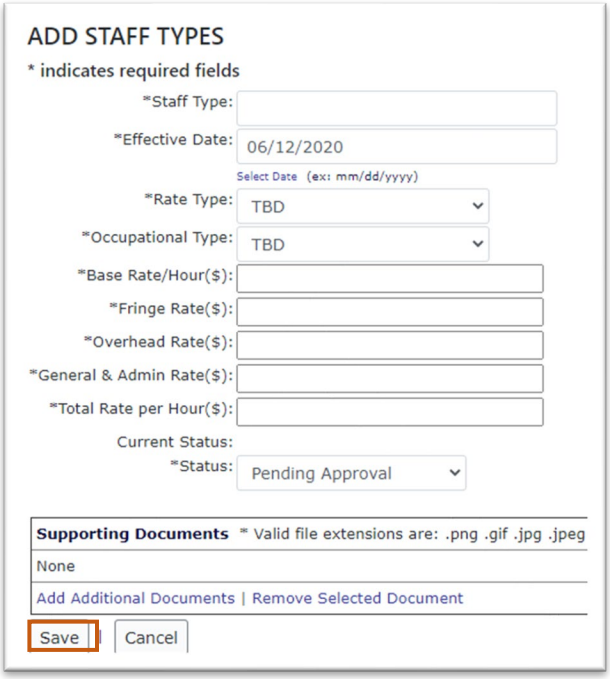


4 To add supporting documents to the Staff Type, select the <**Add Additional Documents**> link. This action opens a field to browse. Select the <**Browse**> link. This action opens a window to choose a file to upload into DRGR. Choose a file and select <**Open**>. To remove documents, select the checkbox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

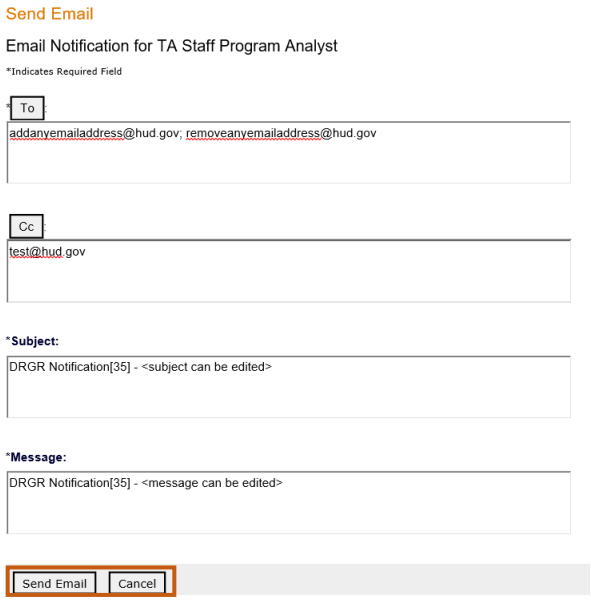


User Role: Grantee User	Menu Option: Manage Staff Types

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



6 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.



Add Staff Type Fields

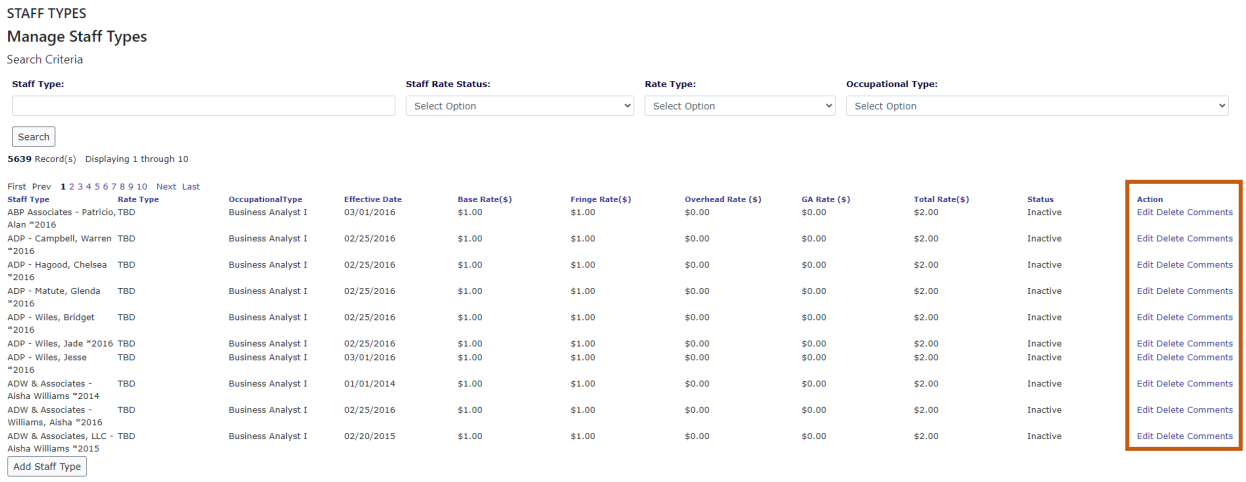
All fields marked with an asterisk are required.

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

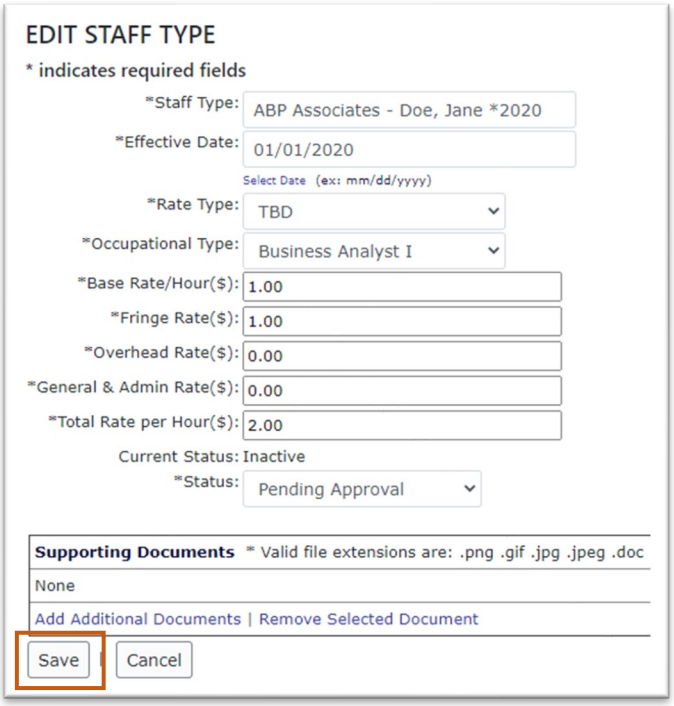
Authorized users of TA Providers (i.e, Grantee Users with the Staff Rate role can correct mistakes or change information on existing rates in DRGR.

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.	



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.

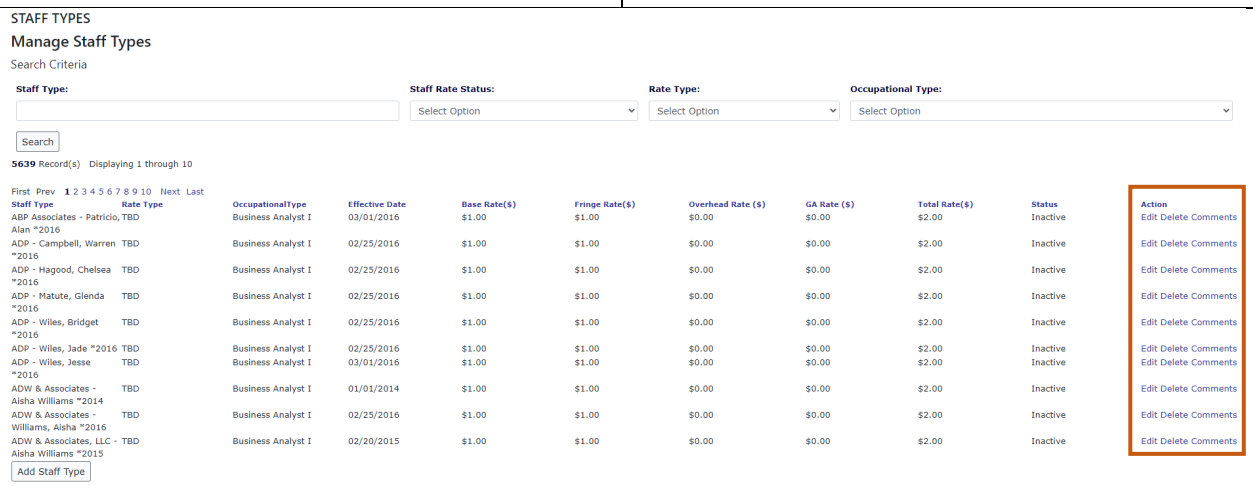


B4. TA Provider | Delete Staff Type

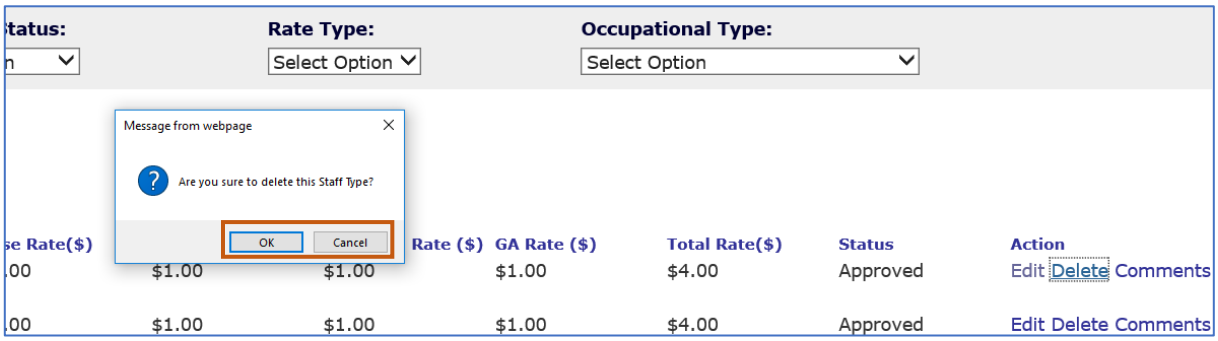
Authorized users of TA Providers (i.e., Grantee Users with the Staff Rate role can delete rates in DRGR. Note: Rates associated with TA work plans cannot be deleted; users may delete only those rates not associated with work plans.

User Role: Grantee User	**Menu Option:** Manage Staff Types
Purpose: Allow TA Provider to delete staff types.	
✓ 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



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



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:

1 To review HUD comments on a Staff Type, follow the steps in Section B1 above to search for the Staff Type.

2 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: Select Option | Rate Type: Select Option | Occupational Type: Select Option

Search

5639 Record(s) Displaying 1 through 10

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

Staff Type	Rate Type	OccupationalType	Effective Date	Base Rate($)	Fringe Rate($)	Overhead Rate ($)	GA Rate ($)	Total Rate($)	Status	Action
ABP Associates - Patricio, Alan *2016	TBD	Business Analyst I	03/01/2016	$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

Add Staff Type

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

Close

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

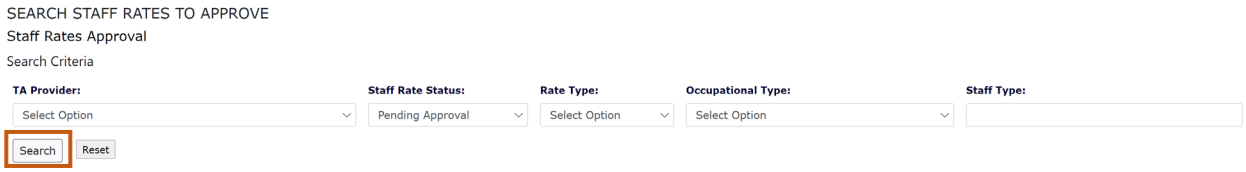
Search Criteria

TA Provider: Select Option | Staff Rate Status: Select Option | Rate Type: Select Option | Occupational Type: Select Option | Staff Type:

Search Reset

User Role: HUD User	**Menu Options:** Review Staff Types

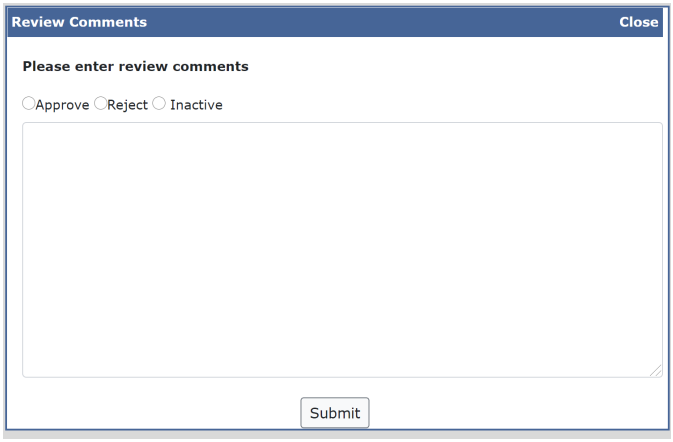
2 On the **"Search Staff Rates to Approve"** page, enter search criteria and select **<Search>**.



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.

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



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.

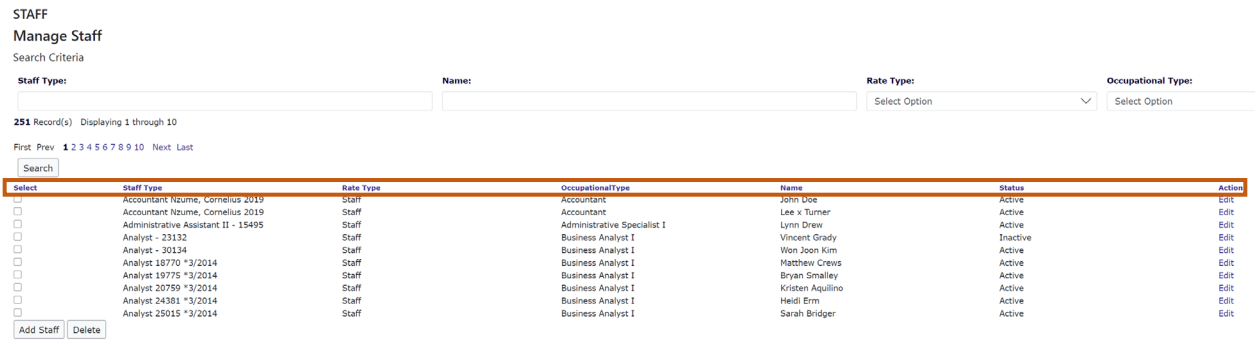
User Role: Grantee Users	**Menu Option:** Manage TA Staff
Purpose: Allow TA Provider to search existing TA personnel	

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.

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



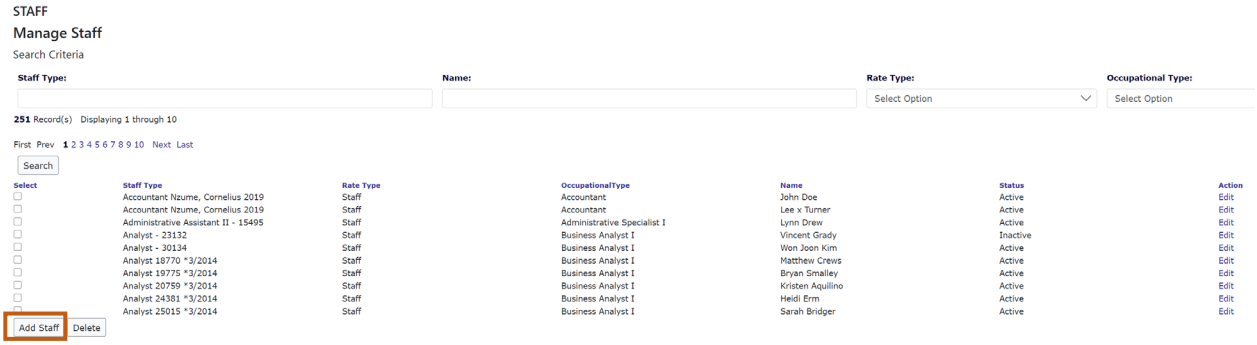
C2. TA Provider | Add Staff

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:

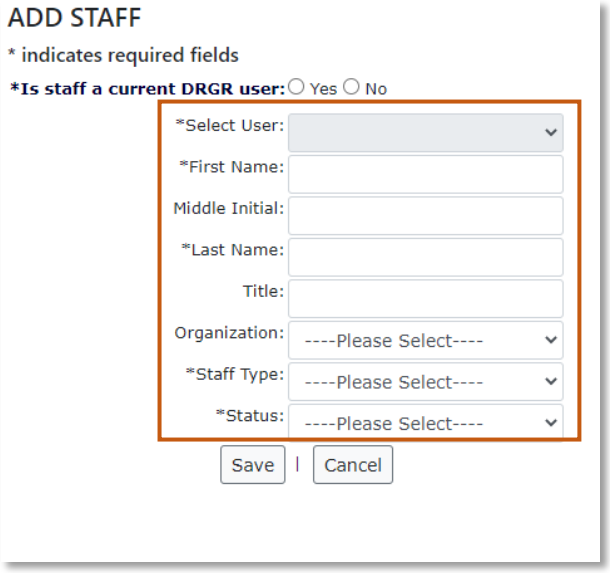
https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance.

User Role: Grantee User	**Menu Option:** Manage TA Staff
Purpose: Allow TA Provider to add new staff.	
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.	

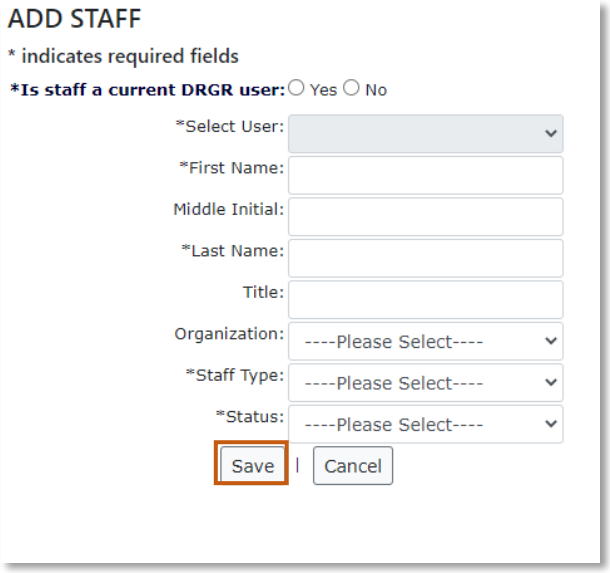


The remainder of this page is intentionally left blank.

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.



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



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

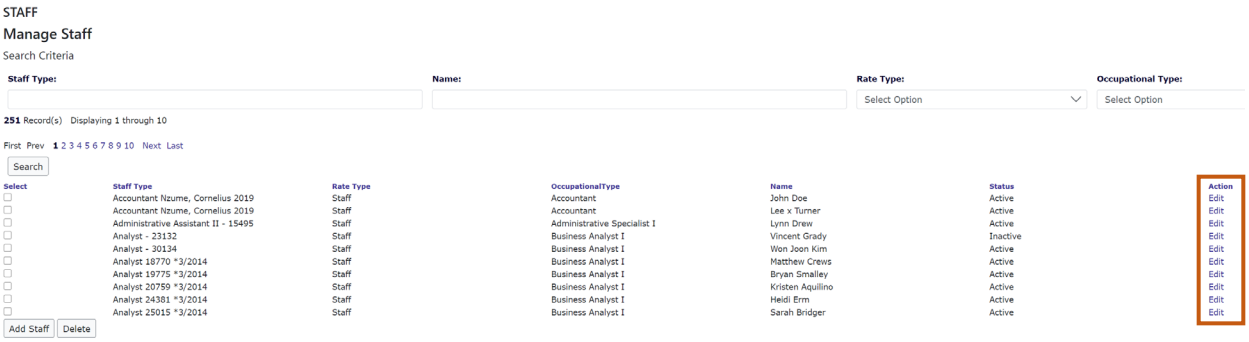
the associated rate for a person unless there is an actual error. Any existing person who gets a new hourly rate should be added as a new person in DRGR.

User Role: Grantee User	**Menu Option:** Manage TA Staff
Purpose: Allow TA Provider to edit staff types.	

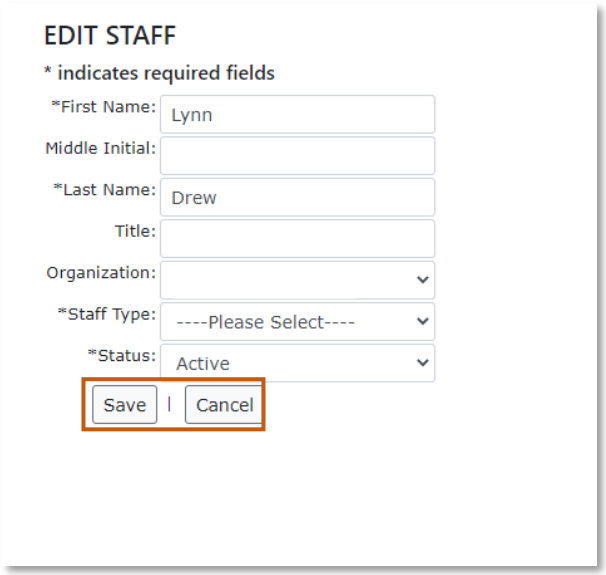
Complete the following steps to edit an existing Staff Type:

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.



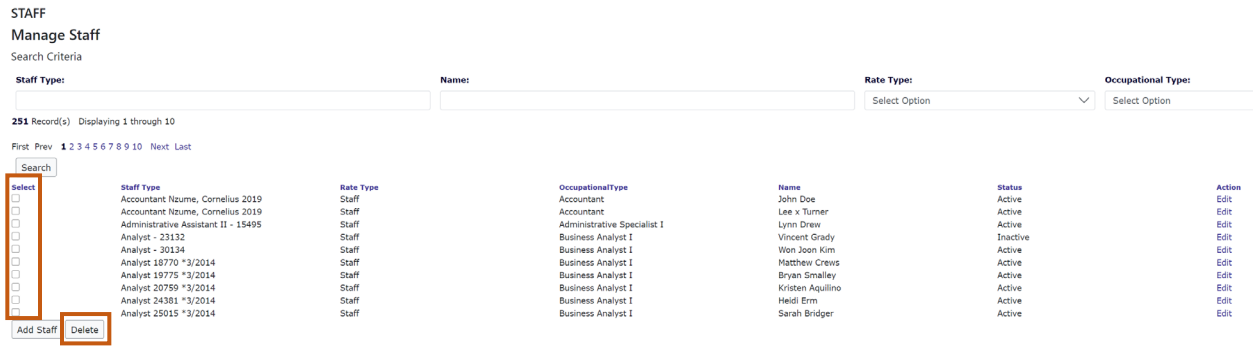
3 On the **"Edit Staff"** page, edit information as appropriate. Select **<Save>** to retain changes. Select **<Cancel>** to cancel the edits and return to previous page.



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.	
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.	



The remainder of this page is intentionally left blank.

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

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.

SUCCESS MESSAGE:

STAFF

Manage Staff

Staff deleted successfully

FAIL MESSAGE:

- **Cannot delete Staff as it is associated with a Ta Activity**

STAFF

Manage Staff

Search Criteria

Chapter 9: RESERVED

This Chapter is reserved for a future release.

Chapter 10: Action Plan Overview | Manage My Grants Module

Chapter 10: Action Plan Overview 1

A. Manage My Grants Module Access 2

A1. Grantee | User Access 2

A2. HUD | User Access 2

B. Action Plan Summary 3

B1. Action Plan Overview 3

B2. Relationship Between Grants and Action Plans 5

B3. Action Plan and Relationship to Projects, Grantee Programs, Activities and TA Work Plans 5

B4. Review Tools 6

B5. Relationship to Performance Reporting 6

B6. HUD Review and Approval 6

C. Manage Action Plan 7

C1. Grantee | Add Action Plan 7

C2. Grantee | Edit Action Plan 10

C3. Grantee and HUD | View Action Plan 11

C4. Grantee and HUD | Download and Print Action Plan 12

C5. Grantee and HUD | Search Action Plans 14

C6. Grantee and HUD | Lookup Consolidated Plans (optional) 15

Chapter 10: Action Plan Overview

This Chapter provides procedures to add, edit, and view DRGR Action Plans contained under **Manage My Grants**. This Chapter also summarizes the relationship between the Action Plan and the Projects, Grantee Programs, Activities, and TA Work Plans.

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

Grantee Users

Menu Option	Subsection	Action
Add Action Plan	C1	Add a new Action Plan
Manage Action Plan	C2	Edit an existing Action Plan
View Action Plan	C3	View an existing Action Plan
Download Action Plan	C4	Download Action Plan PDF
Search Action Plans	C5	Search for Action Plans
Review Tools	--	See Chapter 15
Lookup Consolidated Plans	C6	Lookup Consolidated Plans

HUD Users

Menu Option	Subsection	Action
Manage Action Plan	C3	View an existing Action Plan
View Action Plan	C3	View an existing Action Plan
Download Action Plan	C4	Download Action Plan PDF
Review Action Plan	--	See Chapter 16
Search Action Plans	C5	Search for Action Plans
Review Tools	--	See Chapter 15
Lookup Consolidated Plans	C6	Lookup Consolidated Plans

A. Manage My Grants Module Access

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

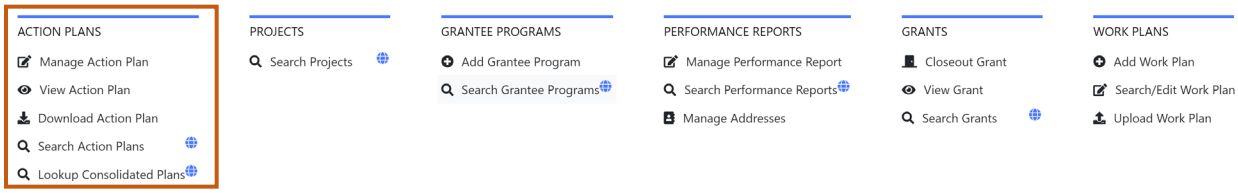
A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan actions.	

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 System displays the relevant menu items based on user type and user roles. While **Manage My Grants** includes seven menus, this Chapter discusses the first menu: "Action Plans." Functions available under this menu are highlighted in the screenshot. The remaining menus under **Manage My Grants** are covered under subsequent Chapters in this Manual.



A2. HUD | User Access

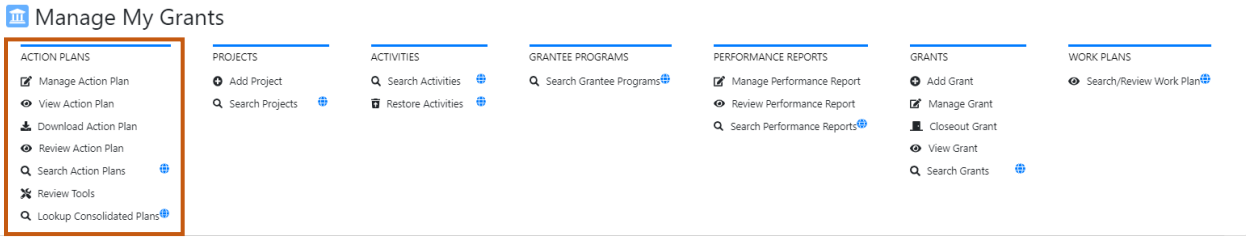
User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Action Plan actions.	

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 System displays the relevant menu items based on user roles. While **Manage My Grants** includes seven menus, this Chapter discusses the first menu: "Action Plans." Functions available under this menu are highlighted in the screenshot. The remaining menus under **Manage My Grants** are covered under subsequent Chapters in this Manual.

User Role: HUD User	**Menu Option:** Manage My Grants Module



B. Action Plan Summary

B1. Action Plan Overview

The DRGR Action Plan is a detailed outline of the proposed activities associated with an award in DRGR. The activities are grouped by Project and by Grantee Program, if applicable. The DRGR Action Plan is typically completed by Grantees after approval of their Published Plan and execution of the Grant Agreement. The proposed activities on the Action Plan serve as the basis for reporting actual performance and the basis for financial transactions. .

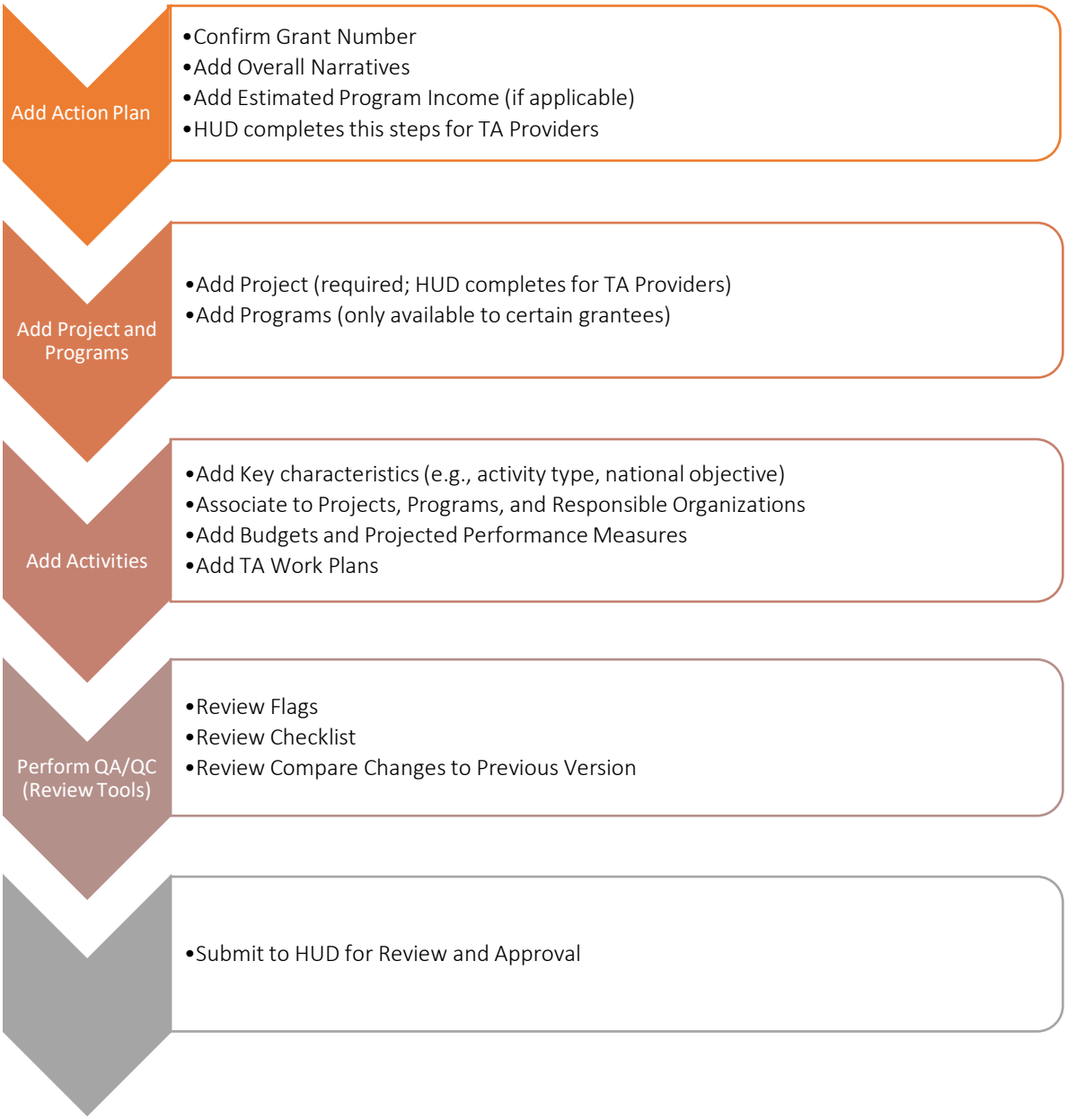
> TIP! To avoid corrections and reconciliations throughout the lifecycle of a grant in DRGR, the Action Plans must properly outline proposed activities.

For non-TA awards in DRGR, the DRGR Action Plan must be substantially similar to a Grantee's Published Action Plan or Substantial Amendment (e.g., Disaster Recovery and NSP, respectively.) Note that as a Grantee amends its Published Action Plan or Substantial Amendment, corresponding changes should be made in DRGR and submitted to HUD for approval. While the published plan often contains high level budgets for eligible activity categories (e.g., Housing, Economic Development), the DRGR Action Plan contains granular level detail on eligible activity types (e.g., housing new construction or housing rehabilitation). For awards associated with TA Providers in DRGR, the Action Plan is initially setup by HUD after the TA Provider signs the award documents and HUD's Forth Worth Accounting Center enters the primary Grant data into LOCCS. TA Provider Action Plans do not typically require re-approval by HUD. Action Plans can be added by TA Providers as well, at HUD's direction. TA Providers should follow the steps in this Chapter for adding Action Plans to Grants, if directed by HUD.

The following figure contains the key actions and processes related to the DRGR Action Plan:

The remainder of this page is intentionally left blank.

DRGR Action Plan Workflow



The remainder of this page is intentionally left blank.

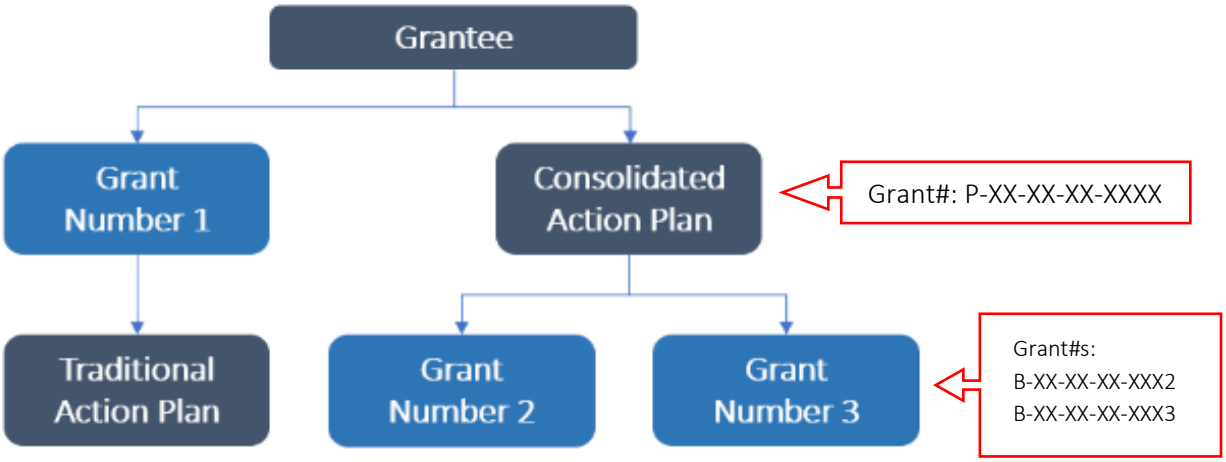
B2. Relationship Between Grants and Action Plans

In the DRGR System, there are two types of relationships between Grants and Action Plans:

- For most Grantees, there is a one-for-one relationship between a Grant and an Action Plan. This means that Grantees report on one Grant at a time.
- In some instances, an Action Plan may be related to more than one Grant. This is referred to as a "Consolidated Action Plan". In these instances, even though the Grantee has one Action Plan and set of QPRs for the group of Grants in a Consolidated Action Plan, Grantees must report financial data for each Grant individually (in the Action Plan budgets, in the **Manage My Financials** module, and in expenditures reported in the performance reports).

TIP! If two or more grants are consolidated under a single Action Plan ("Consolidated Action Plan"), the Action Plan is accessible from the Navigation Bar's "Select Grant" field under a unique Grant Number that begins with a "P" for Parent. The actual Grants that represent an executed Grant agreement are referred to as "Children Grants" under this Parent Grant.

Relationship between Grants and Action Plan in a Consolidated Action Plan



B3. Action Plan and Relationship to Projects, Grantee Programs, Activities and TA Work Plans

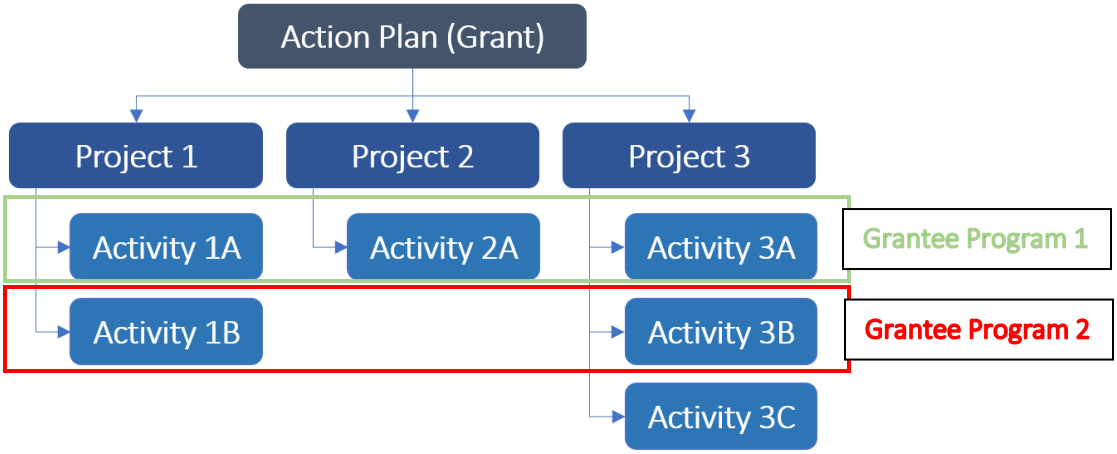
The Action Plan in DRGR outlines proposed activities and groups those activities by Project and by Grantee Programs. TA Work Plans apply to the users associated with TA Providers and populate the Action Plan as activities. As such, activities and TA work plans are one and the same in DRGR.

- Project – presented in detail in Chapter 12 of this User Manual – is the more common grouping of activities. Projects are entered by Grantee Users in DRGR. Projects usually represent major programs, either outlined in the Disaster Recovery Published Plan (e.g., Housing, Economic Development, Infrastructure) or outlined in the TA award. Projects may also represent Responsible Organizations (see Chapter 6). For grants associated with TA Providers, Projects are setup by HUD. For all other grants, Projects are established by the Grantee.
- Grantee Program – presented in detail in Chapter 13 of this Manual – is available if HUD flags an award or an appropriation as needing the additional information. This option is used in limited instances, typically those with large awards and complex programs (e.g., Disaster Recovery

Grantees). DRGR Programs offer a unique way to group and report cumulative data in illustrative dashboards.

- Activities – presented in detail in Chapter 14 of this Manual – are associated with one Project and may be associated with one Grantee Program. Activities in DRGR contain most of the information used by HUD to monitor for compliance with program requirements. For awards associated with TA Providers, activities and work plans are one in the same and are populated based on TA work plan details.

DRGR Action Plan Hierarchy for an Action Plan Related to One Grant Only



B4. Review Tools

Review Tools offer Grantee and HUD Users functions to aid with compliance. The use of Review Tools as a quality assurance/quality control function is optional, but highly recommended. See Chapter 15 of this User Manual for more information on Review Tools.

B5. Relationship to Performance Reporting

The Action Plan establishes the template for reporting accomplishments in the performance reports. See Chapters 19-22 for more information on QPRs. If information is not established in the Action Plan (e.g., projected rental households assisted), it will not be available to report on in the QPR. Further, Grantees cannot submit a QPR until the action plan is approved by HUD.

TIP! *Proposed* accomplishments are established in the action plan. *Actual* accomplishments are reported in the QPR. Set up the action plan properly to ensure accurate reporting!

B6. HUD Review and Approval

For awards other than TA awards, the initial Action Plan and every subsequent edit to the Action Plan requires submission to HUD for review and approval. The required submission to HUD may include minor and significant edits that constitute a Substantial Amendment. See Chapter 16 for more information.

TIP! A Grantee will make many edits to its action plan over the course of a grant lifecycle.

C. Manage Action Plan

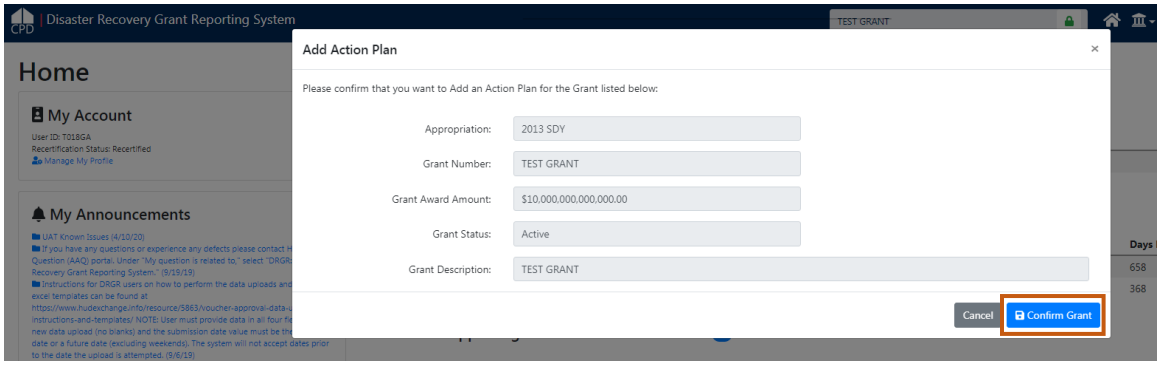
C1. Grantee | Add Action Plan

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Add Action Plan

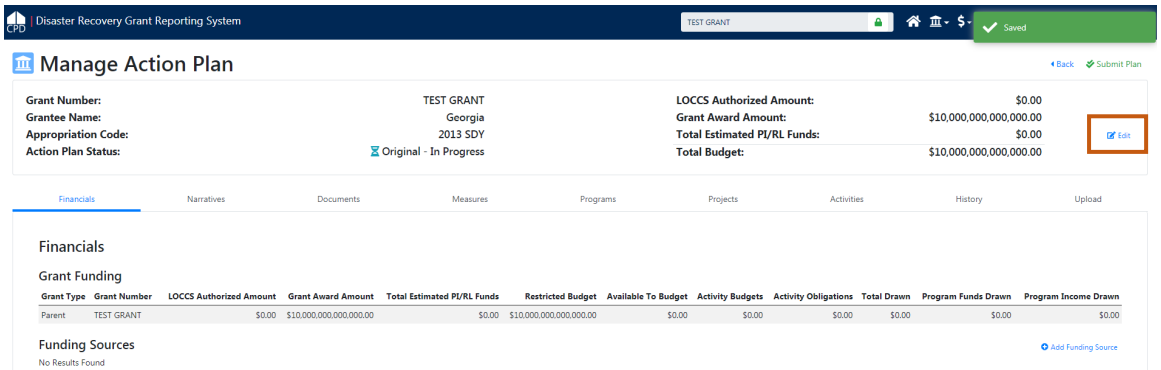
Purpose: Allow Grantee Users (excluding TA Provider Users) to add a DRGR Action Plan (required one time only).

Complete the following steps to add a DRGR Action Plan and Estimate Program Income:

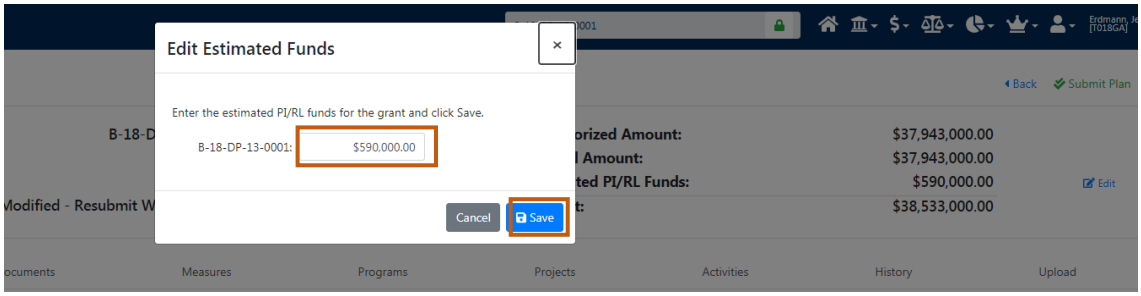
1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Section A1. Select <**Add Action Plan.**>. The **"Add Action Plan"** page will load. Review the information and select **<Confirm Grant>**. If the information is incorrect, contact your CPD Representative. The **"Manage Action Plan"** page will load.



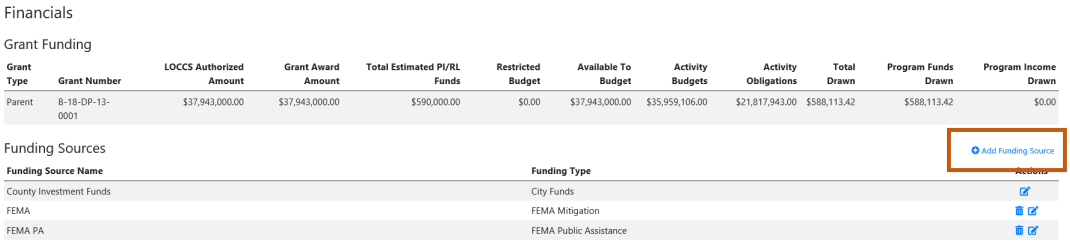
2 On the "**Manage Action Plan**" page, summary details about the Grant will be displayed at the top of the page. Functions for "Financials", "Narratives", "Documents", "Measures", "Programs", "Projects", "Activities", "History", and "Upload" are found in the tabs below. See Section C2 below for more information on Action Plan tabs. To add "Estimated PI/RLF Funds" (if applicable), select **<Edit>** to the right of the Grant details.



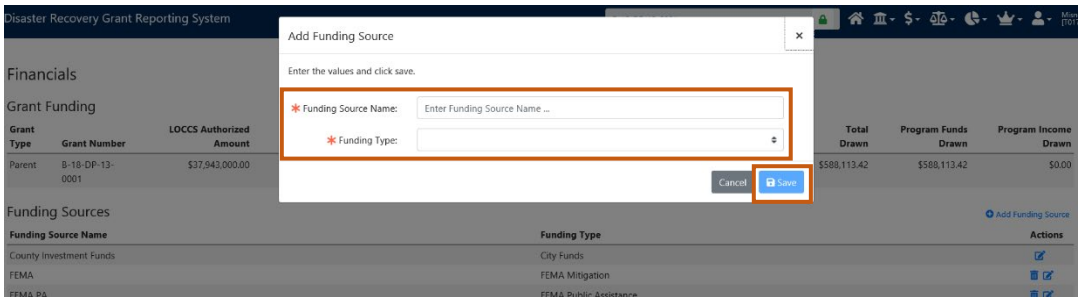
3 Enter the Estimated PI/RLF Funds and select **<Save>**.



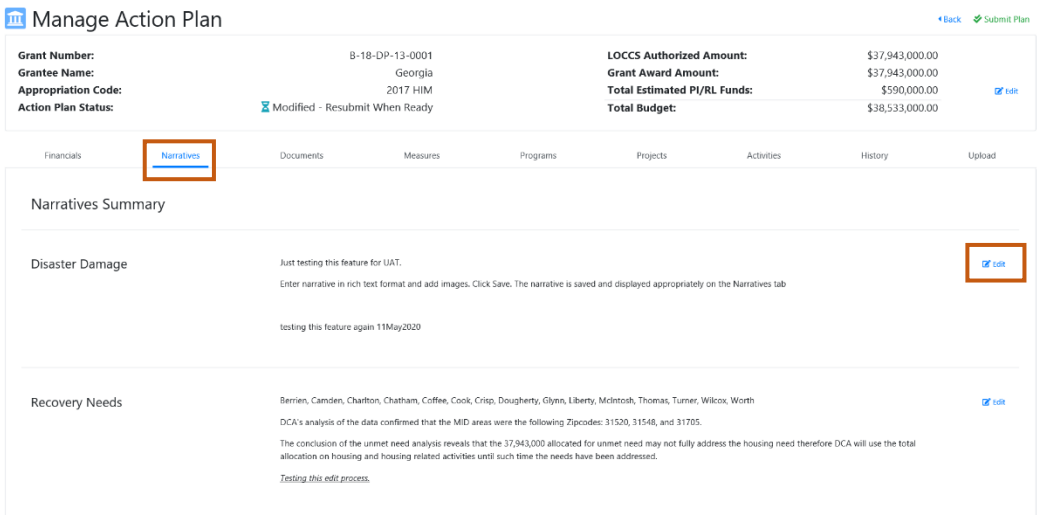
4 To add "Funding Sources" (if required or desired), in the **<Financials>** tab, select **<Add Funding Sources>** to the right of the "Funding Sources" table.



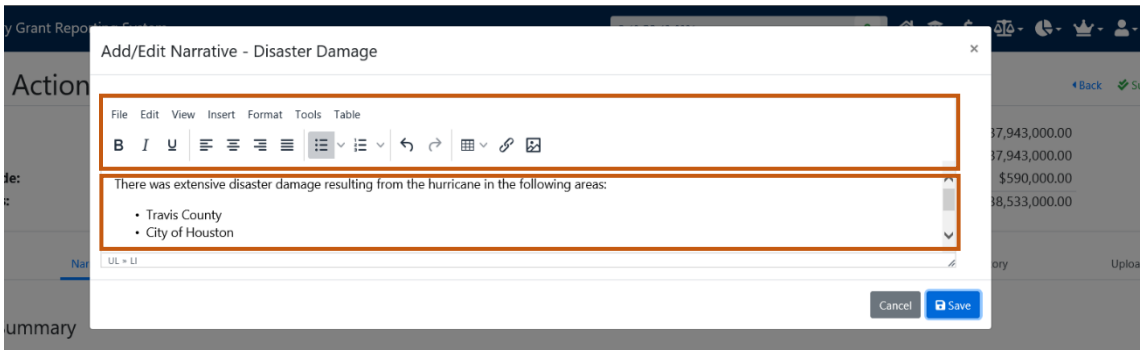
5 Enter a "Funding Source Name," select a **<Funding Type>** from the dropdown menu and select **<Save>**. This funding source will now be available to report activity-level match or leverage funding.



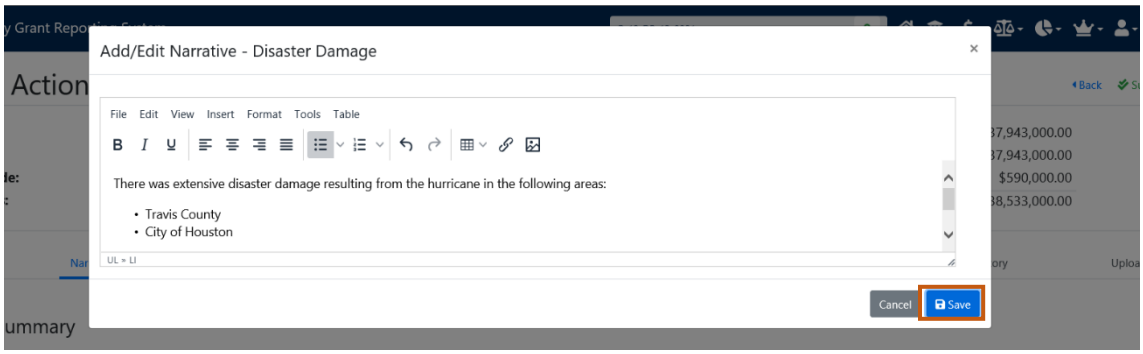
6 To enter "Overall Narratives" (required) in the action plan, select the **<Narratives>** Tab, then select **<Edit>** next to each Narrative heading.



7 Enter the Narrative (usually borrowed from the Published Plan). Utilize the menu options that appear above the text field to format the text, insert images and tables, etc.



8 Once completed, select **<Save>** to return to the **"Manage Action Plan"** page.



9	This completes the "Action Plan-level" actions (i.e. confirming the Grant, adding/editing estimated PI, and adding/editing Action Plan narratives). Additional steps, including adding project and activities and submitting the Action Plan to HUD are described in Chapters 10-18.

C2. Grantee | Edit Action Plan

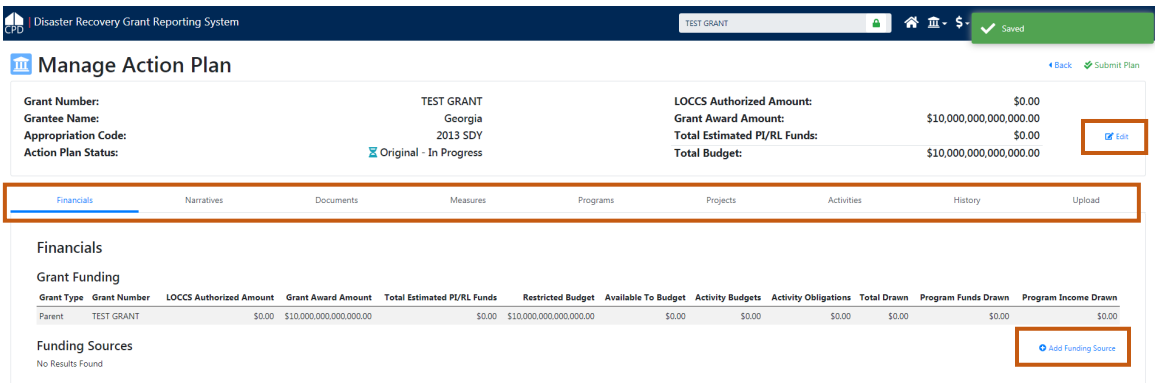
The DRGR Action Plan is fluid and may change often. Nearly all Grantees will, at some point, need to revisit the information in the Action Plan and make changes. It is important to understand that those changes, even if minor, will require resubmission of the Action Plan to HUD for review and approval. If a Grantee is making several changes to their Action Plan, they may wait until all of the changes are made and submit the Action Plan at once (instead of incrementally) to their HUD Representative for review.

TIP! Since the DRGR Action Plan must be substantially similar to the Published Plan, certain changes to the Action Plan may trigger additional public participation requirements. Grantees should work with their CPD Rep to determine if additional public participation is required.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Action Plan
Purpose: Allow Grantee Users (excluding TA Provider Users) to edit the DRGR Action Plan.	

Complete the following steps to edit a DRGR Action Plan:

1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Section A1. Select **<Manage Action Plan>**.The **"Manage Action Plan"** page will load. Select one of the nine (9) tabs from the **"Manage Action Plan"** page to edit components of the Action Plan. See "Components of the DRGR Action Plan" table below for an overview of each tab's functions. Each tab will load additional edit capabilities unique to that tab.



Components of the DRGR Action Plan

Financials	Provides a summary of grant- and project-level financial data; allows Grantees to add "Funding Sources."
Narratives	Allows Grantees to enter grant-level narratives.
Documents	Allows Grantees to attach supporting documents to the action plan.
Measures	Provides a summary of proposed accomplishments and beneficiaries across all activities.
Programs	Allows Grantees to add/edit/delete Programs (see Chapter 13).
Projects	Allows Grantees to add/edit/delete Projects (see Chapter 12).
Activities	Allows Grantees to add/edit/delete Activities (see Chapter 14).
History	Provides links to previously approved versions of the Action Plan, including "Review Checklists Completed by HUD."
Upload	Allows Grantees to upload Action Plan data (see Chapter 34).
Estimated PI/RLF Funds	Accessible from the top right of the **"Manage Action Plan"** page. Allows Grantee to add/edit Estimated PI/RLF Funds.

C3. Grantee and HUD | View Action Plan

The "View Action Plan" feature allows the Grantee and HUD Users to view all the components of a DRGR Action Plan (e.g., Projects and Activities) in one location. These steps apply to TA Provider Users and HUD Users who manage TA awards.

User Role: Grantee and HUD User	**Menu Option:** View Action Plan
Purpose: Allow Grantee and HUD Users to view a DRGR Action Plan.	
✓ Complete the following steps to view a DRGR Action Plan:	
1 Navigate to the **Manage My Grant** module and locate the **Action Plan** menu. See Section A1 and A2. Select **<View Action Plan>.** The **"View Action Plan"** page will load. Choose a hyperlink to jump to the desired section of the DRGR Action Plan.	

User Role: Grantee and HUD User	**Menu Option:** View Action Plan

View Action Plan

Grant Number:
B-18-DP-13-0001

Grantee Name:
Georgia

LOCCS Authorized Amount:
$37,943,000.00

Grant Award Amount:
$37,943,000.00

Estimated PI/RL Funds:
$590,000.00

Total Budget:
$38,533,000.00

- Disaster Damage
- Recovery Needs
- Mitigation Proposed
- UAT 8.1 results
- Test HMN #1
- Test HMN #2
- View Action Plan History
- View Review Checklist History

Project #	Project Title	Grantee Activity #	Activity Title
01- DCA-UAT Update	01- DCA-UAT Update 1	01 - DCA ADMIN	01 - DCA ADMIN
		02- DCA Planning	02- DCA Planning
		03- HRRP	03- HRRP
		04- Buyout	04- Buyout
02- Multifamily	02- Multifamily	2019-073 Kingsland Multifamily	2019-073 Kingsland Multifamily (Arbours)
		2019-075 Brunswick Multifamily	2019-075 Brunswick Multifamily (Perry Place)
		2019-077 Kingsland Multifamily	2019-077 Kingsland Multifamily (Grove Park)
		2019-080 Albany Multifamily	2019-080 Albany Multifamily (Havenwood)
		TEST UAT	TEST HMN
04- Brunswick	04- Brunswick	04-Brunswick Buyout LM	04-Brunswick Buyout LM
		04-Brunswick Buyout UN	04-Brunswick Buyout UN
		04-Brunswick HRRP LM	04-Brunswick HRRP LM

2 The DRGR System will automatically navigate to that component of the Action Plan.

Grantee Activity Number: 2019-075 Brunswick Multifamily

Activity Title: 2019-075 Brunswick Multifamily (Perry Place)

Project #/Project Title: 02- Multifamily / 02- Multifamily

Grantee Program:

Activity Type:
Affordable Rental Housing

Activity Status:
Under Way

National Objective:
Low/Mod: Benefit to low- and moderate-income persons/families

Projected Start Date:
08/22/2019

Total Budget: $2,000,000.00
Most Impacted and Distressed Budget: $2,000,000.00
Other Funds Total: $0.00
Total Funds Amount: $2,000,000.00

Projected End Date:
08/22/2024

Block Drawdown:
Blocked by Grantee
Activity Draw Block by HUD
Project Draw Block by HUD

Blocked by:

Block Drawdown Date:

Blocked by:

Benefit Report Types: Direct(Households)

Proposed Beneficiaries	Total	Low	Mod	Low/Mod%
# of Households	56	26	30	100.00%
# Renter Households	56	26	30	100.00%

Proposed Accomplishments	Total
# of Housing Units	56
# of Multifamily Units	56
# of Properties	1

Activity is being carried out by the Grantee:
No

Activity is being carried out through:

Organization carrying out Activity:
Georgia Department of Community Affairs

C4. Grantee and HUD | Download and Print Action Plan

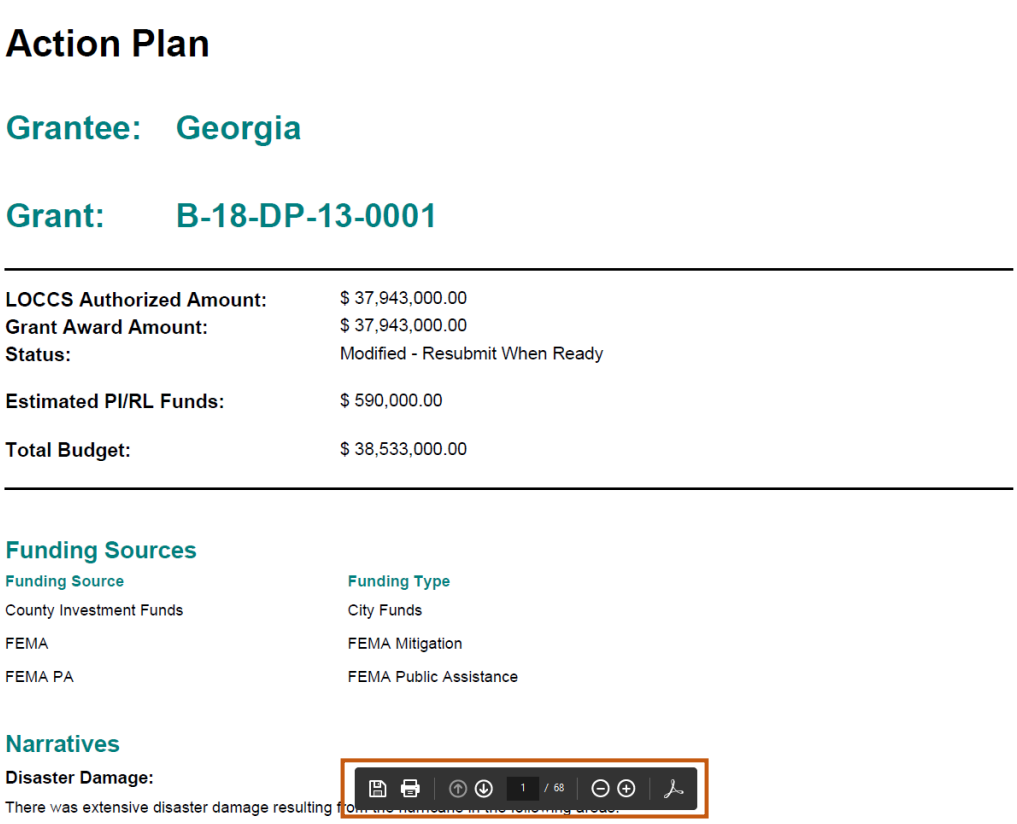
The PDF version of the Action Plan can be saved for the Grantee's records and/or posted on the Grantee's website for disaster recovery. The PDF will appear in a separate window of the internet browser. These steps apply to TA Provider Users and HUD Users who manage TA awards.

User Role: Grantee and HUD User	**Menu Option:** Download Action Plan
Purpose: Allow Grantee and HUD Users to download and print a PDF version of the DRGR Action Plan.	

User Role: Grantee and HUD User	**Menu Option:** Download Action Plan

Complete the following steps to download and print the DRGR Action Plan:

1 Navigate to the **Manage My Grant** module and locate the **Action Plan** menu. See Section A1 and A2 above. Select **<Download Action Plan>**. This will open a PDF of the Action Plan in a new window. To save the Action Plan PDF, select the **<Save>** or icon on the bottom of the page.



Action Plan

Grantee: Georgia

Grant: B-18-DP-13-0001

LOCCS Authorized Amount:	$ 37,943,000.00
Grant Award Amount:	$ 37,943,000.00
Status:	Modified - Resubmit When Ready
Estimated PI/RL Funds:	$ 590,000.00
Total Budget:	$ 38,533,000.00

Funding Sources

Funding Source	Funding Type
County Investment Funds	City Funds
FEMA	FEMA Mitigation
FEMA PA	FEMA Public Assistance

Narratives

Disaster Damage:

There was extensive disaster damage resulting f

2 To print the action plan PDF, slect the **<Print>** or icon on the bottom of the page.

The remainder of this page is intentionally left blank.

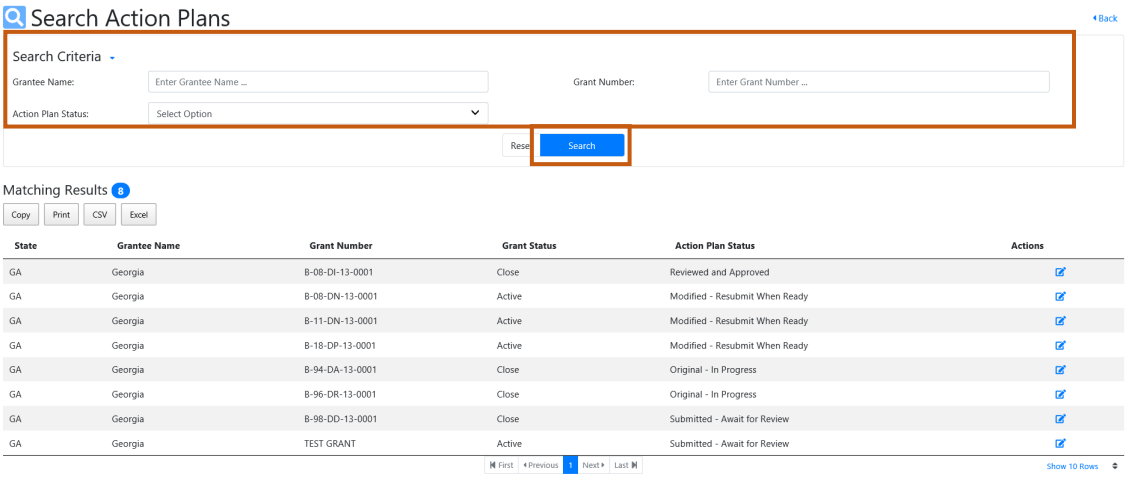
C5. Grantee and HUD | Search Action Plans

The "Search Action Plan" feature allows Grantee and HUD Users to view every DRGR Action Plan in their portfolio. From this page, users can also navigate to the desired Action Plan, even if not selected in the Navigation Bar. These steps apply to TA Provider Users and HUD Users who manage TA awards.

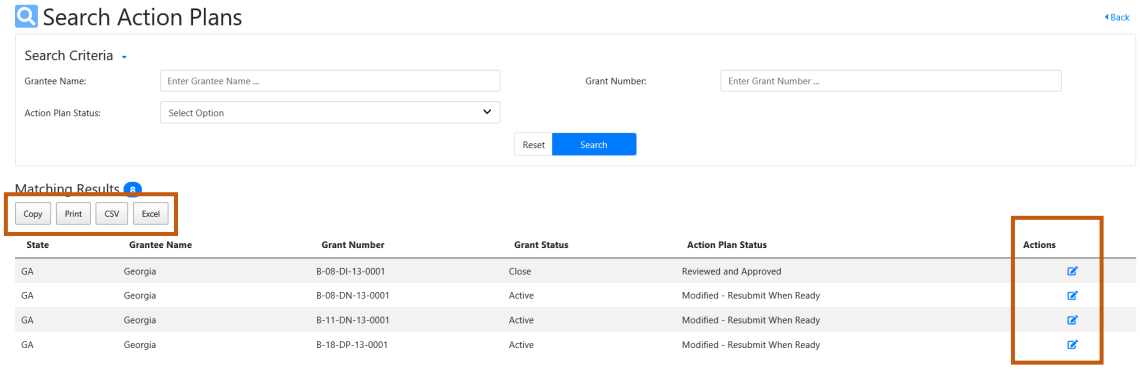
User Role: Grantee and HUD User	**Menu Option:** Search Action Plans
Purpose: Allow Grantee and HUD Users to access all Action Plans within their portfolio.	

Complete the following steps to search and access DRGR Action Plans:

1 Navigate to the **Manage My Grant** module and locate the **Action Plan** menu. See Section A1 and A2 above. Select **<Search Action Plan>**. The **"Search Action Plan"** page will load. Enter search criteria and select **<Search>**. Search results will load.



2 Select the desired Action Plan under the "Action" column to navigate to the Action Plan. Users also have the option of copying, printing, or downloading the search results via MS Excel or CSV.



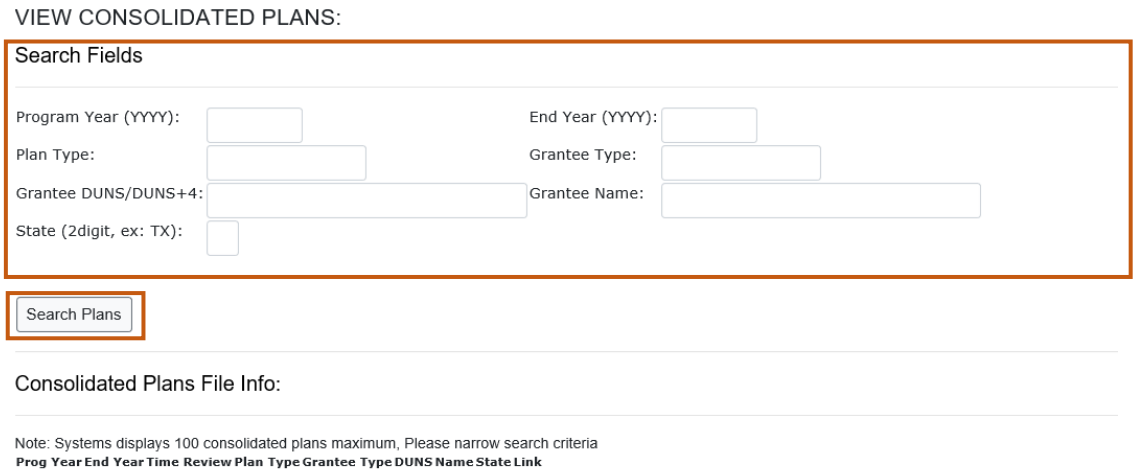
C6. Grantee and HUD | Lookup Consolidated Plans (optional)

The "Lookup Consolidated Plans" feature is optional and is for informational purposes only.

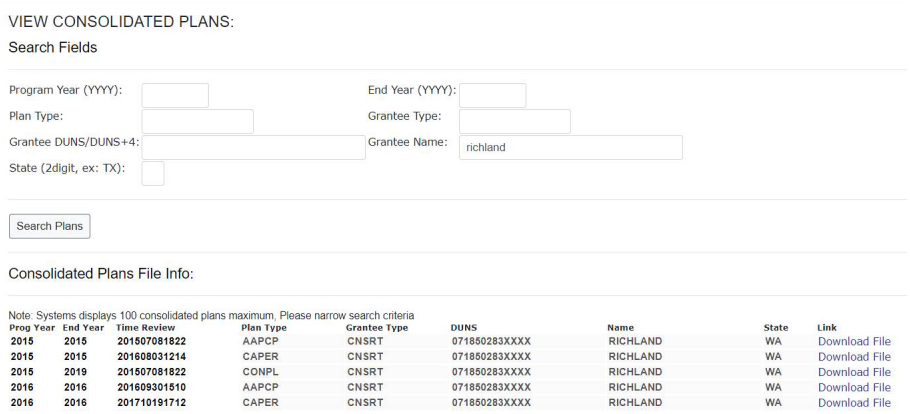
User Role: Grantee and HUD User	**Menu Option:** Lookup Consolidated Plans
Purpose: Allow Grantee and HUD Users to look up and view Consolidated Plans.	

Complete the following steps to look up and view Consolidated Plans:

1 Navigate to the **Manage My Grant** module and locate the **Action Plan** menu. See Section A1 and A2 above. Select **<Lookup Consolidated Plan>**. The **"View Consolidated Plans"** page will load. Enter search criteria and select **<Search Plans>**.



2 Search results will load. To view a Consolidated Plan, select the desired Consolidated Plan.



Chapter 11: RESERVED

This Chapter is reserved for a future release.

Chapter 12: Projects | Manage My Grants Module

Chapter 12: Projects | Manage My Grants Module 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Manage Projects 3

B1. Grantee and HUD | Search and View Project 4

B2. Grantee and HUD | Add Project 5

B3. Grantee and HUD | Edit Project 7

B4. Grantee and HUD | Delete Project 9

C. Project Blocks and Restricted Projects 11

C1. Project Drawdown Blocks 11

C2. Restricted Projects 11

Chapter 12: Projects | Manage My Grants Module

This Chapter provides procedures to add, edit, and delete Projects contained in the **Manage My Grants** module. For Grantee Users associated with TA Providers, the add and edit functions for Projects are not applicable. Rather, the add and edit Project functions are applicable to HUD Users who oversee TA awards in DRGR. See Chapter 10 for additional information on the relationship between the Action Plan, Projects, Activities, and TA Work Plans.

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

Grantee Users

Menu Option	Subsection	Action
Add Project	B2	Add new Project to the Action Plan
Search Projects	B1, B3, B4	Search, edit, and delete existing Projects

HUD Users (non-TA)

Menu Option	Subsection	Action
Search Projects	B2	Search and view Grantee Projects

HUD Users Assigned to TA Awards

Menu Option	Subsection	Action
Search Projects	B2-B4	Search, view, edit, and delete Grantee Projects

A. Manage My Grants Module Access

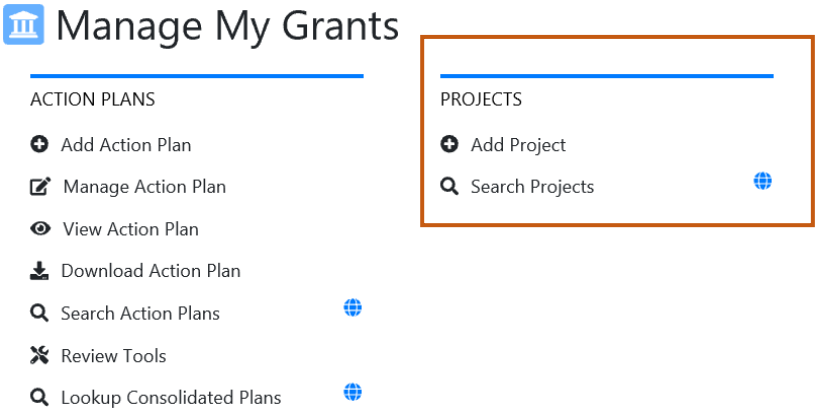
The **Manage My Grants** module contains all Action Plan Project actions.

A1. Grantee | User Access

User Role: Grantee Users	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan Project actions.	
Complete the following steps to acess the Manage My Grants Module:	
1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation bar.	

User Role: Grantee Users	**Menu Option:** Manage My Grants Module

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



A2. HUD | User Access

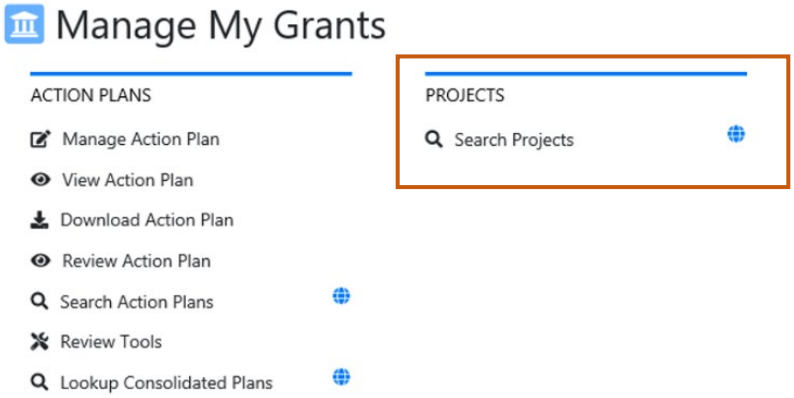
User Role: HUD User	**Menu Option:** Manage My Grants Module

Purpose: Allow HUD Users to access Action Plan Project actions.

Complete the following steps to acess the Manage My Grants Module:

1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation bar.

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

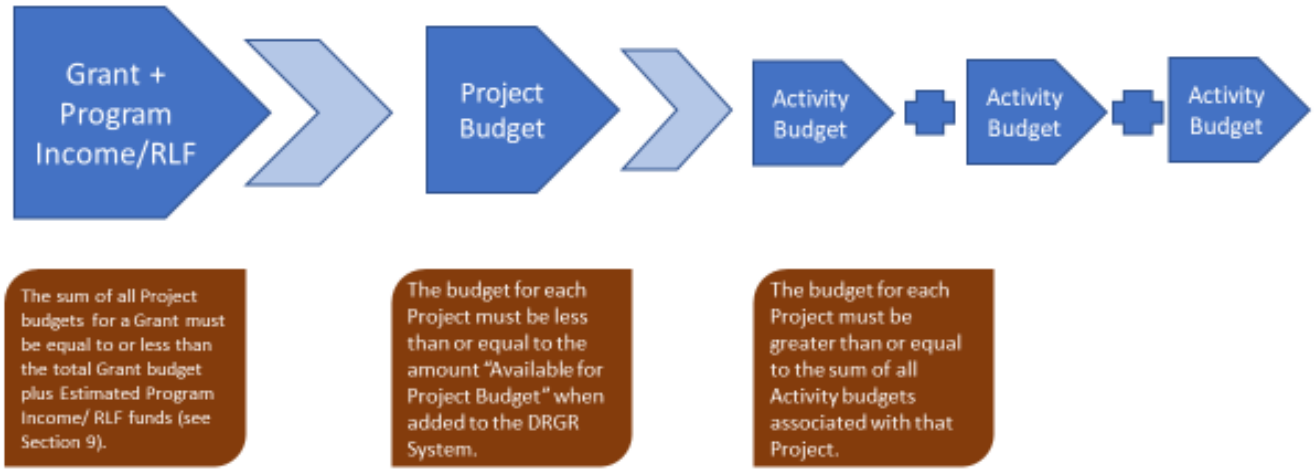


B. Manage Projects

The primary purpose of "Projects" is to group similar activities by categories such as major programs outlined by the TA Program, in the Disaster Recovery Published Plan (e.g., Housing, Economic Development, Infrastructure) or by Responsible Organization (see Chapter 6). Projects can also be used to track budgets for Responsible Organizations, contracts, subrecipient agreements, local account codes, or activity types.

TIP! The sum of Project Budgets should correlate with the high-level budgets contained in the Disaster Recovery Published Plan.

Project Budget Rules: The DRGR System enforces the following budget rules to ensure Grantees do not exceed award budget and spending authority:



* Note: For Technical Assistance Providers, the Activity Budget and TA Work Plan budget are one in the same.

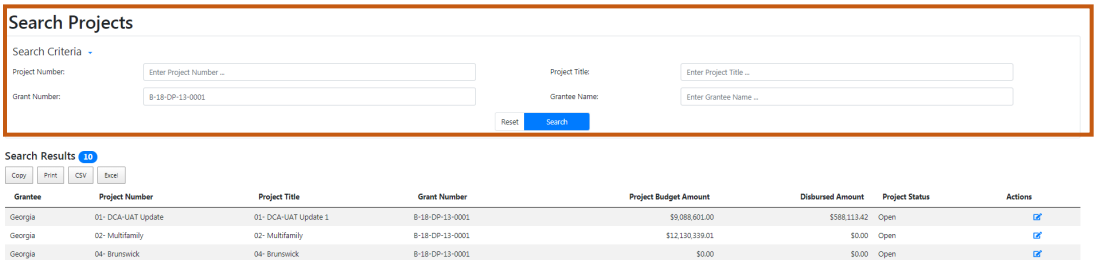
B1. Grantee and HUD | Search and View Project

User Role: Grantee Users (including TA Providers) and HUD Users	**Menu Option:** Search Projects

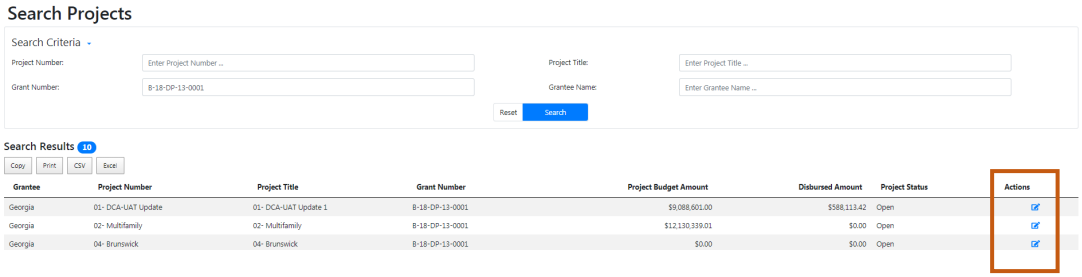
Purpose: Allow Grantee Users (including TA Providers) and HUD Users to search and view an Action Plan Project.

Complete the following steps to search and view an Action Plan Project:

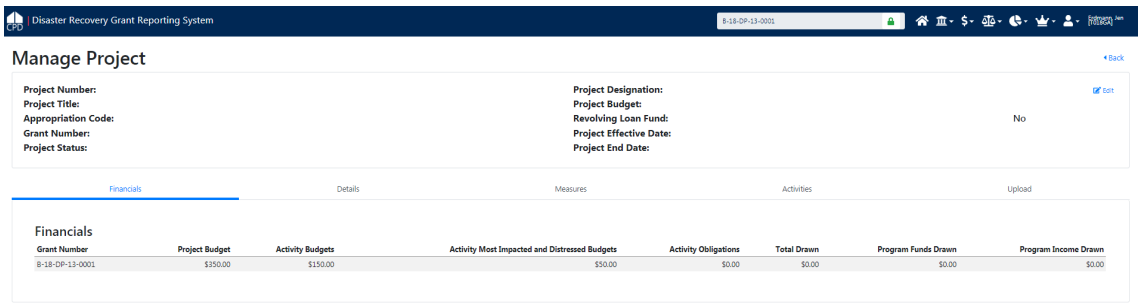
1 Navigate to the **Manage My Grants** module and locate the **Projects** menu. See Sections A1 and A2 above. Select **<Search Projects>**. The **"Search Projects"** page will load. Enter search criteria and select **<Search>**. Search results will load.



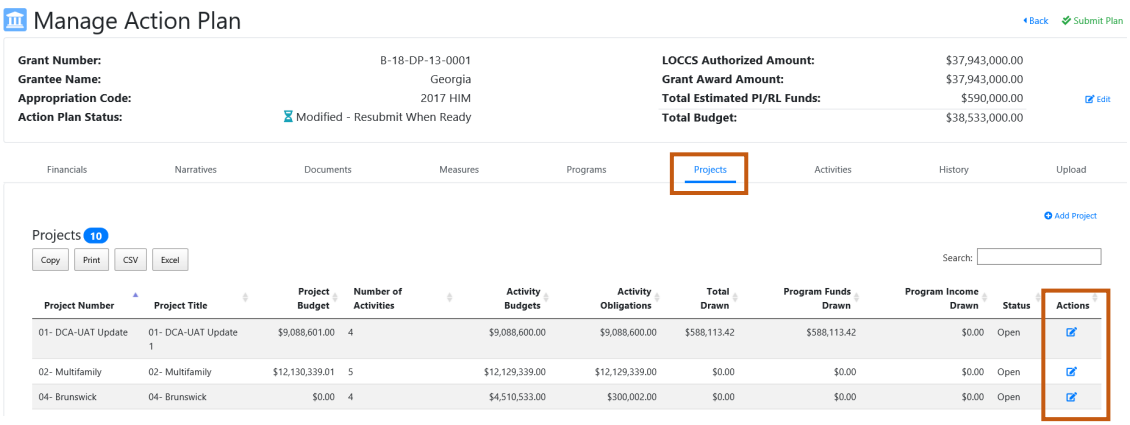
2 Locate the desired Project and select **<View>** located in the "Action" column.



3 The **"Manage Project"** page will load.



4 Alternatively, Projects can be viewed directly from the **"Manage Action Plan"** page "Projects" tab.

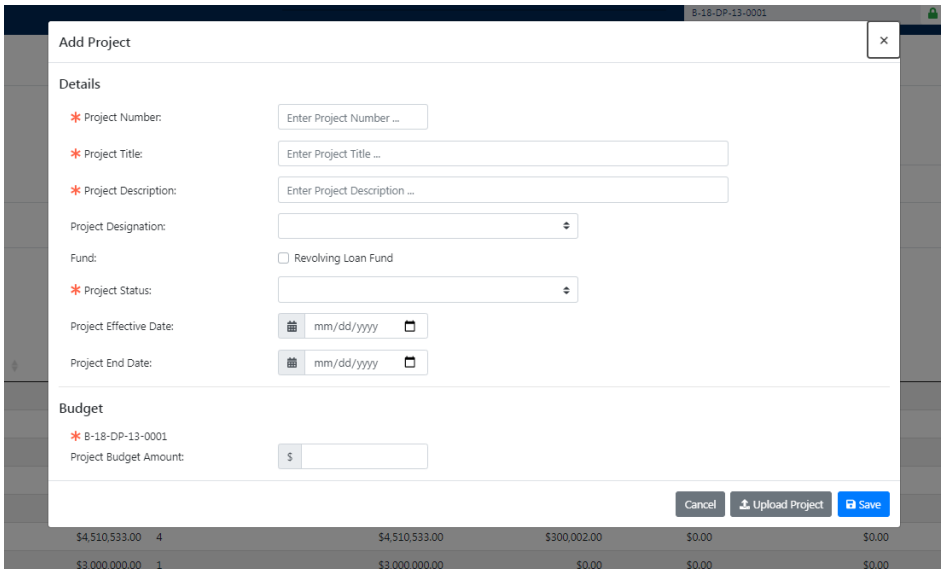


B2. Grantee and HUD | Add Project

User Role: Grantee Users (excluding TA Provider Users) and HUD TA Users	**Menu Option:** Add Project
Purpose: Allow Grantee Users (excluding TA Provider Users) to add a Project to an Action Plan.	

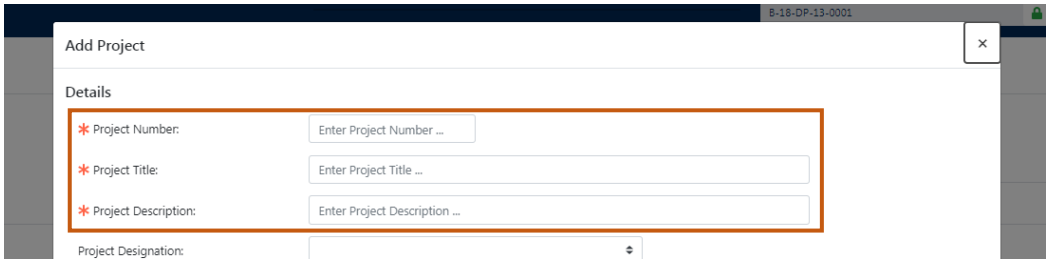
Complete the following steps to add a Project to an Action Plan:

1 Navigate to the **Manage My Grants** module and locate the **Project** menu. See Section A1 above. Select **<Add Projects>**. The **"Add Project"** page will load. Complete, at minimum, all required fields marked with an asterisk (*).



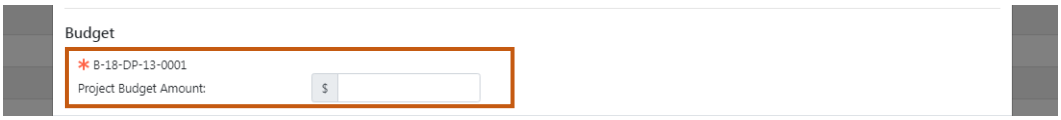
User Role: Grantee Users (excluding TA Provider Users) and HUD TA Users	**Menu Option:** Add Project

2 The "Project Number," "Project Title," and "Project Description" are details designated by the Grantee.

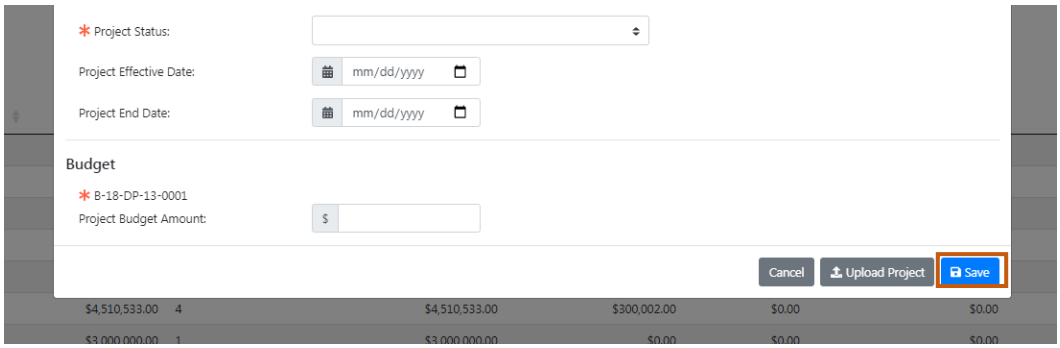


3 The "Project Status" field should be designated as "Open." The only other option is "Cancelled".

4 The "Project Budget Amount'" field must include both Program Funds (Grant funds) and Program Income.

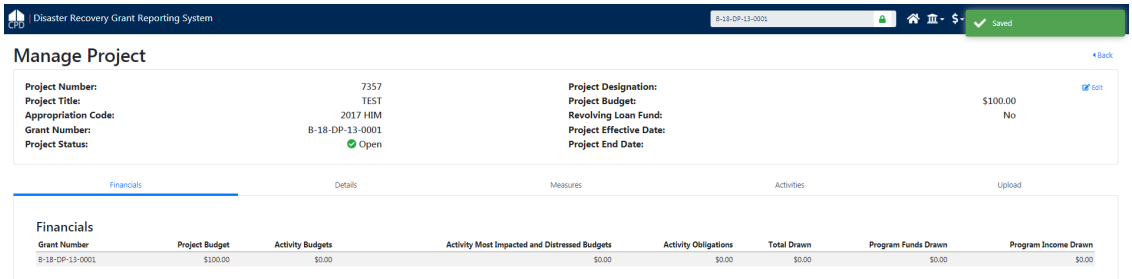


5 Once complete, select the **<Save>** button on the bottom-right of the pop-up window to add the Project.

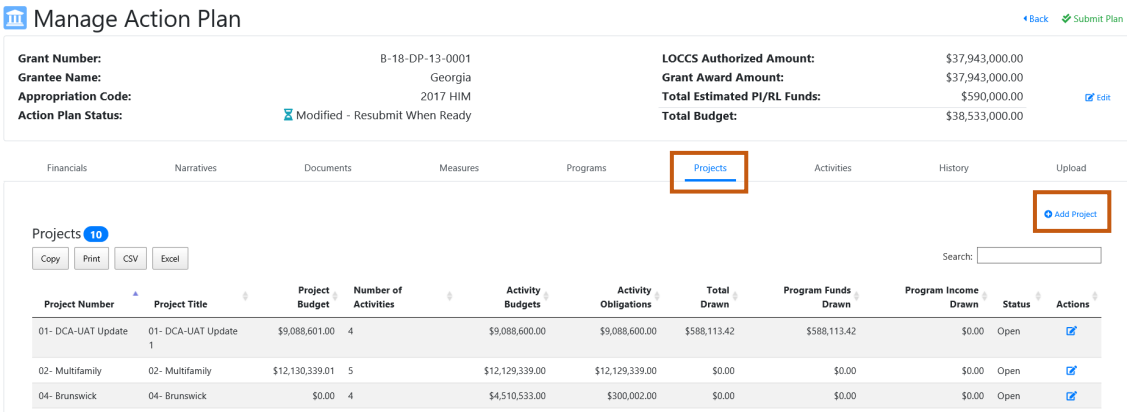


User Role: Grantee Users (excluding TA Provider Users) and HUD TA Users	**Menu Option:** Add Project

6 The **Manage Project** page will load and display the information entered.



7 Alternatively, Projects can be added by following the same steps after selecting **<Add Project>** from the **Manage Action Plan** "Projects" tab.



B3. Grantee and HUD | Edit Project

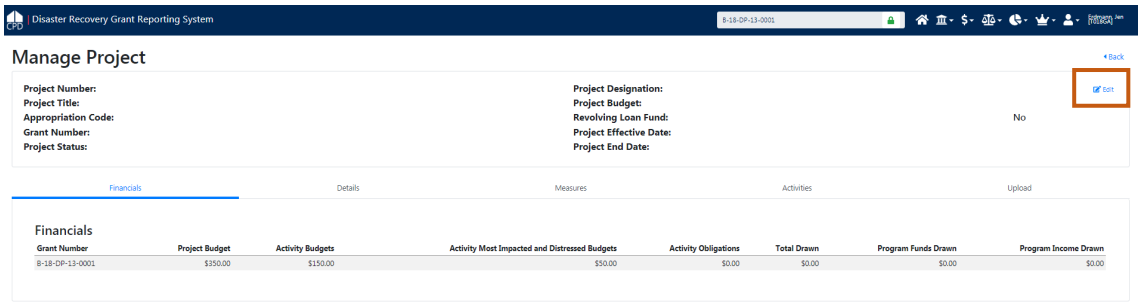
User Role: Grantee Users (excluding TA Provider Users) and HUD TA Users	**Menu Option:** Search Projects

Purpose: Allow Grantee Users (excluding TA Provider Users) and HUD TA Users to edit an existing Action Plan Project.

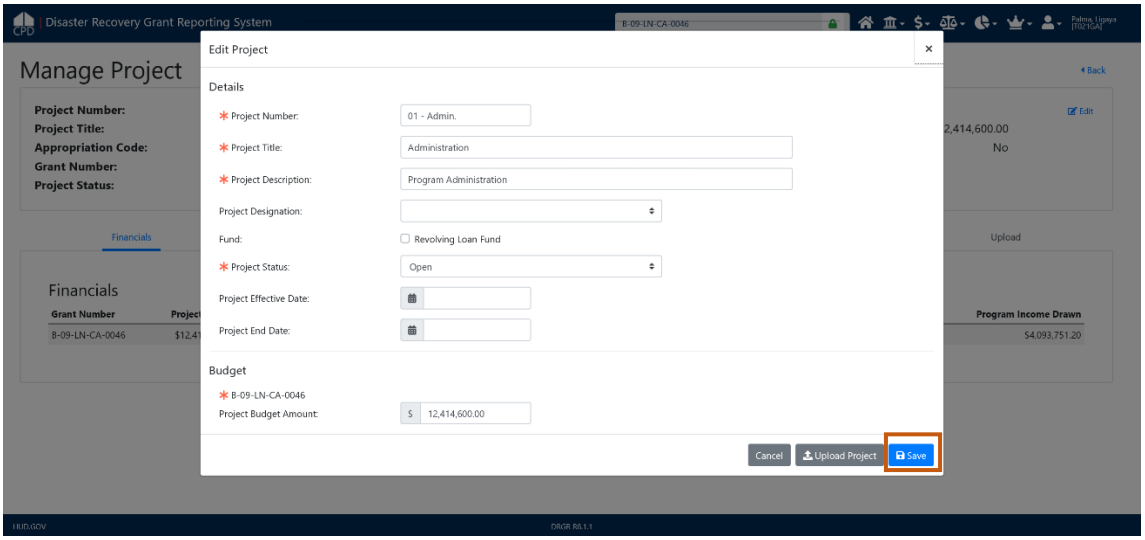
Complete the following steps to edit an existing Action Plan Project:

1 Follow steps in Section B1 to search for Projects that need to be edited.

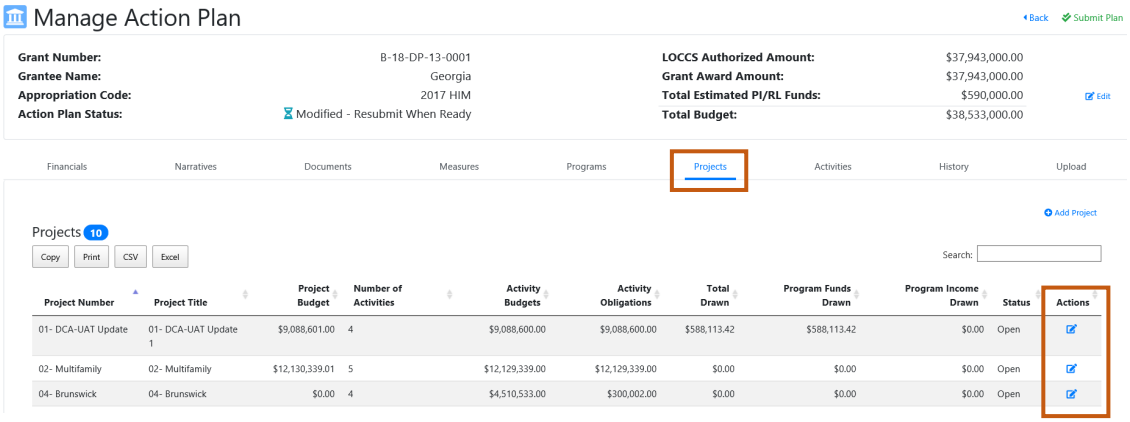
2 From the **"Manage Project"** page, select **<Edit>** on the top right of the page to edit the Project. The **"Edit Project"** page will load.



3 From the **"Edit Project"** page, users may modify the Project details. When complete, select **<Save>**.



4 Alternatively, Projects can be edited from the **Manage Action Plan** "Projects" tab.

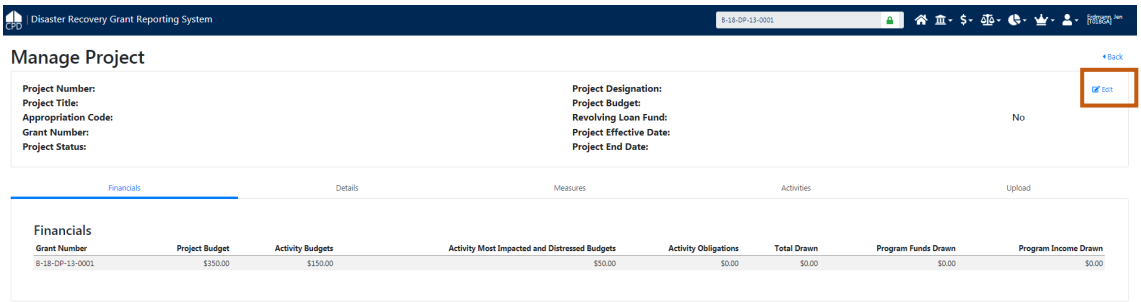


B4. Grantee and HUD | Delete Project

Action Plan Projects can be deleted if they were erroneously created or are no longer needed. The following conditions must be met to delete a Project from the DRGR System. These conditions apply to Grantee Users who are not associated with TA Providers.

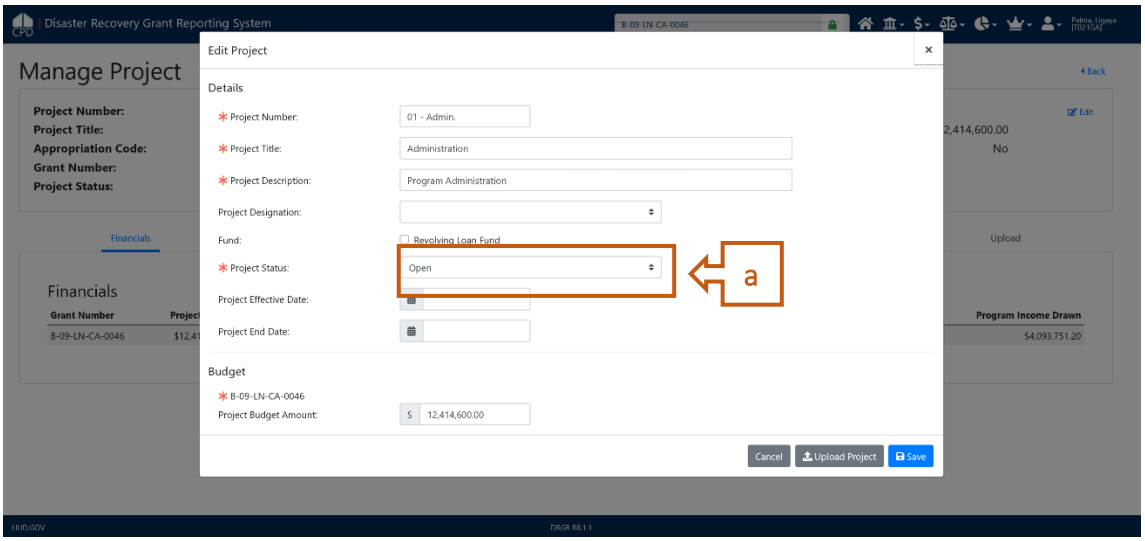
- All Activities associated with the Project must be in "Cancelled" status
- The Project must be in "Cancelled" status
- The Project budget must be $0.00

User Role: Grantee Users (excluding TA Provider Users) and HUD TA Users	**Menu Option:** Search Projects
Purpose: Allow Grantee Users (excluding TA Provider Users) and HUD TA Users to delete an Action Plan Project.	
Complete the following steps to delete an Action Plan Project:	
1 Follow steps in Section B1 to search for Projects that need to be deleted.	
2 On the **"Manage Project"** page, elect **<Edit>** on the top right of the page to edit the Project.	

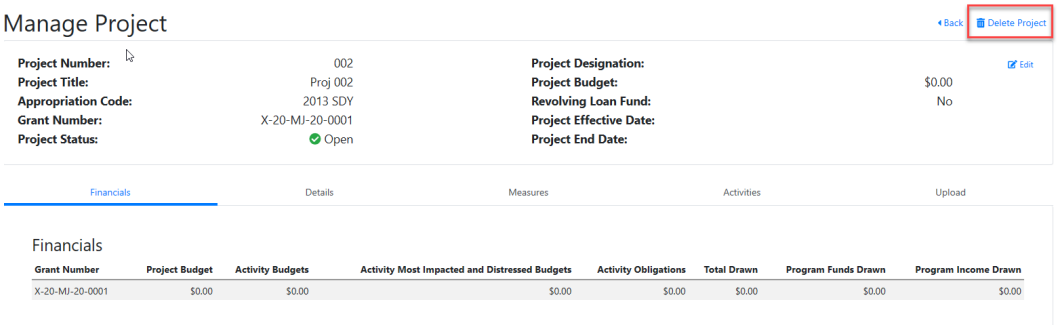


The remainder of this page intentionally left blank.

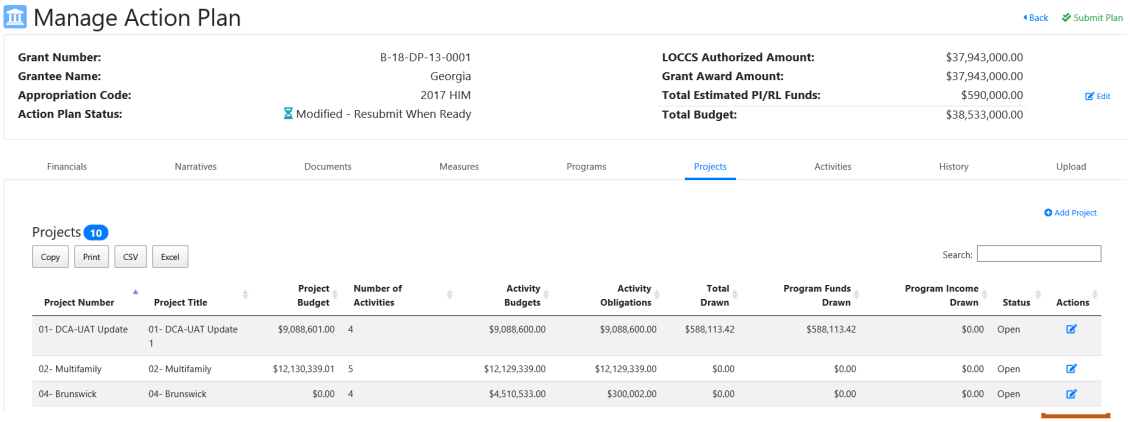
3 The **"Edit Project"** page will pop-up. Change the "Project Status" to "Cancelled" and the "Project Budget Amount" to $0.00. When complete, select **<Save>**.



4 The **"Manage Project"** page will load. Select **<Delete Project>** on the upper-right of the page.



5 Alternatively, Projects can be edited and deleted from the "**Manage Action Plan**" page "Projects" tab. Follow steps 2 through 5 above after accessing the "Projects" tab as shown below.



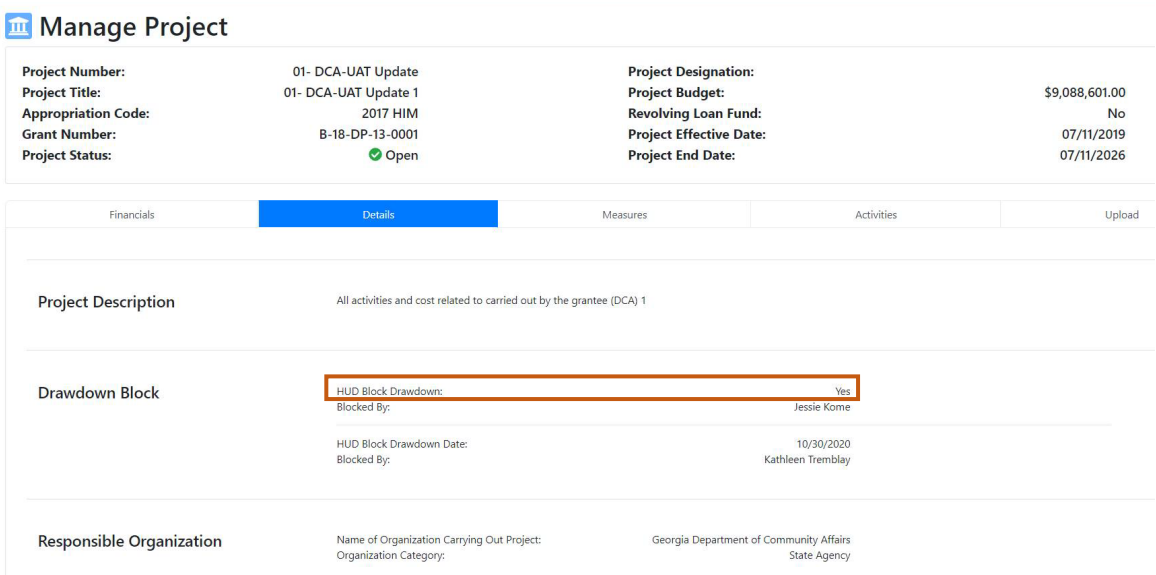
C. Project Blocks and Restricted Projects

C1. Project Drawdown Blocks

HUD Superusers can block drawdowns at the Project (and Grant and Activity) level. When this occurs, Grantee Users are unable to drawdown funds for all Activities associated with that Project until the block is lifted. In addition, HUD may designate a future "Block Drawdown Date." This automatically applies a drawdown block for all Activities associated with that Project on the designated date.

NOTE: The Project Drawdown Block feature, can be used by HUD to enforce expenditure deadlines, like the two- and six-year expenditure deadlines for Disaster Recovery grantees.

Grantees should contact their CPD Representative if unsure as to why a Project is blocked.



C2. Restricted Projects

All Grants have a "Restricted Balance" Project pre-loaded into DRGR. This is a special project used by HUD to restrict Grantees from drawing a specific amount of the Grant award from LOCCS. The "Restricted Balance" Project is used by HUD to control the Grantees access to the Grant funds. HUD can restrict all grant funds or a portion of the grant funds. HUD may also use the "Restricted Balance" Project to recapture Grant funds, thereby prohibiting the funds from being budgeted and drawn from Activities.

The "Restricted Balance" Project budget represents the amount of Grant funds withheld from the Grantee's total award. If the "Restricted Balance" Project budget is $0.00, the Grantee has access to the entire award obligated in the Grant Agreement(s). Grantees are discouraged from associating Activities to the "Restricted Balance" Project because Grantees cannot drawdown funds from those activities until moved to another Grantee-created Project.

Only a DRGR Superuser in HUD Headquarters can reduce the “Restricted Balance” Project budget. Grantees should contact their CPD Representative if unsure as to why the “Restricted Balance” Project budget is greater than $0.00.

Chapter 13: Grantee Programs | Manage My Grants Module

Chapter 13: Grantee Programs 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Managing Grantee Programs 3

B1. Grantee and HUD | Search and View a Grantee Program 3

B2. Grantee | Add a Grantee Program 5

B3. Grantee | Edit a Grantee Program 6

B4. Grantee | Associate a Program to Activities 7

B5. Grantee | Delete a Grantee Program 10

Chapter 13: Grantee Programs

This Chapter provides procedures to add, edit, view, and delete Grantee Programs contained in the **Manage My Grants** module. See Chapter 10 for additional information on the relationship between the DRGR Action Plan, Programs, Activities, and TA Work Plans.

Note: Grantee Programs offer a unique way to group and report cumulative data for the programs described in the Disaster Recovery Published Action Plan. Grantee Programs are only available to a limited number of Grantees. HUD must setup the Grantee Program structure for the grant or the appropriation and then Grantee Users can group activities by Grantee Program. HUD will typically allow Grantee Program use for those grants or appropriations with large awards and complex programs (e.g., Disaster Recovery Grantees).

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

Grantee Users

Menu Option	Subsection	Action
Add Grantee Program	B2	Add a new Program to the Action Plan
Search Grantee Programs	B1, B3, B5	Search, view, edit, and delete existing Programs
Search Activities	B4	Associate Programs with Activities

HUD Users

Menu Option	Section	Action
Search Grantee Programs	B1	Search and view existing Programs

A. Manage My Grants Module Access

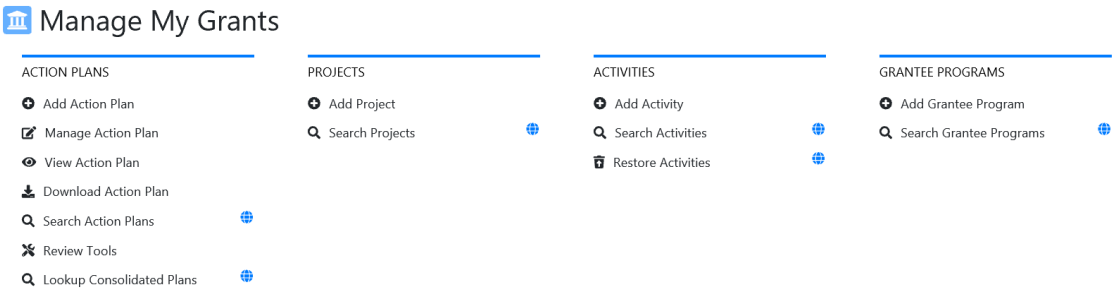
The **Manage My Grants** module contains all Action Plan Program actions.

A1. Grantee | User Access

User Role: Grantee Users	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan Grantee Program actions.	
Complete the following steps to acess the Manage My Grants Module:	
1 In the DRGR System, select the **Manage My Grant**s module, or icon, located in the navigation bar.	

User Role: Grantee Users	**Menu Option:** Manage My Grants Module

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



A2. HUD | User Access

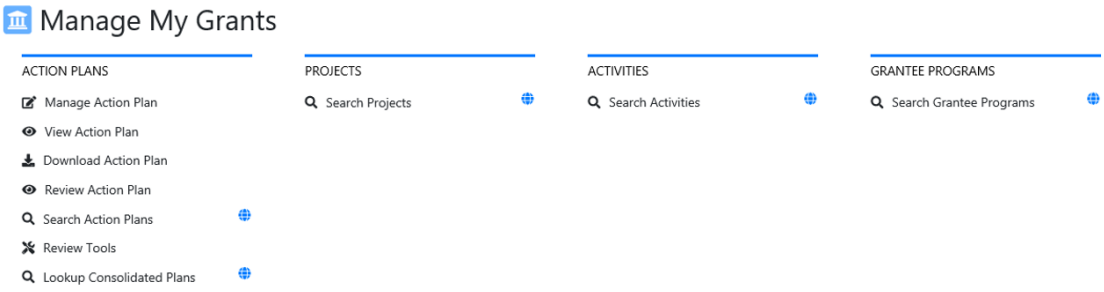
User Role: HUD User	**Menu Option:** Manage My Grants Module

Purpose: Allow HUD Users to access Action Plan Grantee Program actions.

Complete the following steps to acess the Manage My Grants Module:

1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation bar.

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



B. Managing Grantee Programs

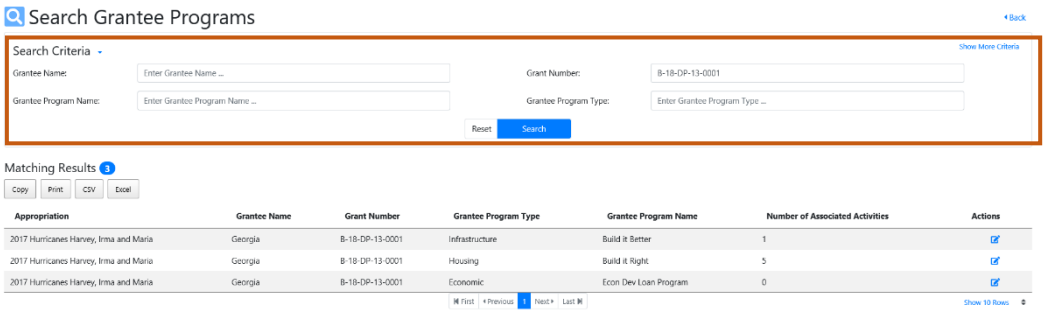
B1. Grantee and HUD | Search and View a Grantee Program

Only Grantee users can add, edit, and delete Grantee Programs. Grantee and HUD Users can search and view Grantee Programs, including Program-level aggregate financial and accomplishment data.

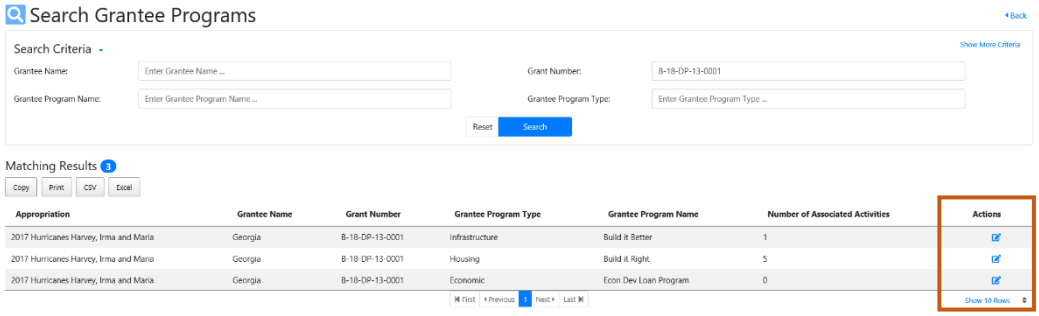
User Role: Grantee and HUD User	**Menu Option:** Search Grantee Programs
Purpose: Allow Grantee and HUD Users to view Grantee Program-level data.	

Complete the following steps to view Grantee Programs:

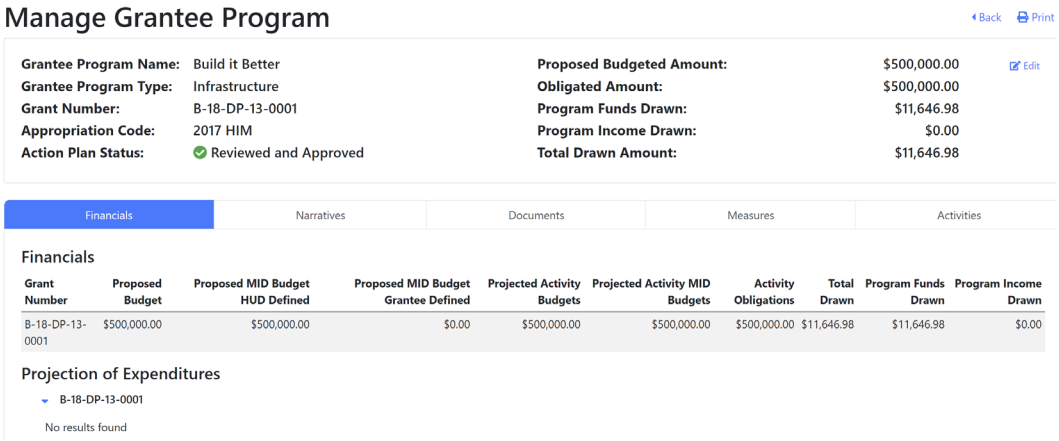
1 Navigate to the **Manage My Grants** module and locate the **Grantee Programs** menu. See Section A1 above. Select **<Search Grantee Programs>.** The **"Search Grantee Programs"** page loads. Enter search criteria and select **<Search>**. Search results will load.



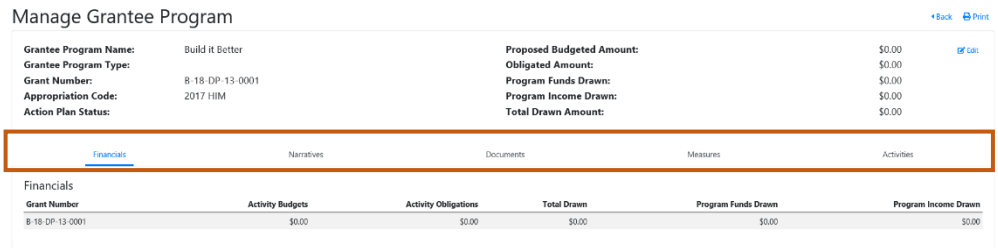
2 Locate the desired Grantee Program and select **<View>** located in the "Action" column.



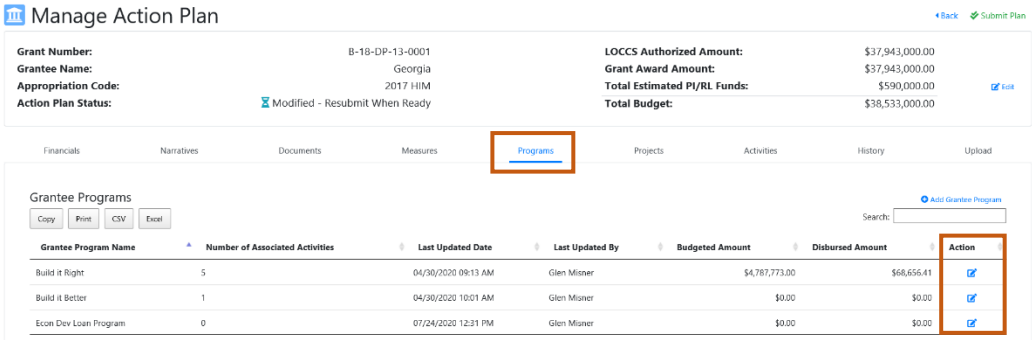
3 The **"Manage Grantee Program"** page will load.



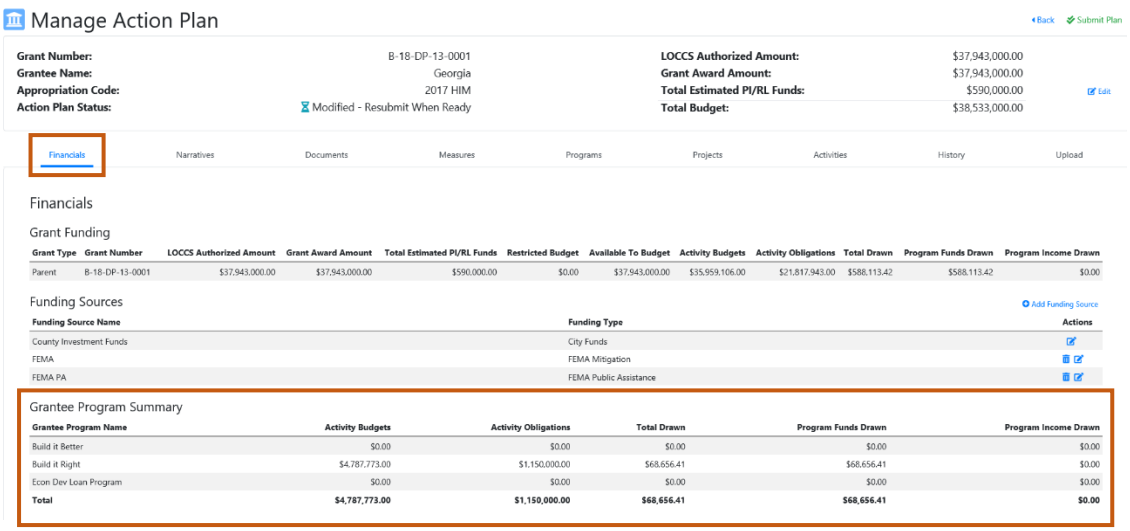
4 Select one of the five tabs from the **"Manage Grantee Program"** page to view components of the Grantee Program.



5 Alternatively, Grantee Programs can be viewed from the **"Manage Action Plan"** page "Programs" tab.



6 Summary Grantee Program Financial data also appears on the **"Manage Action Plan"** page "Financial" tab.

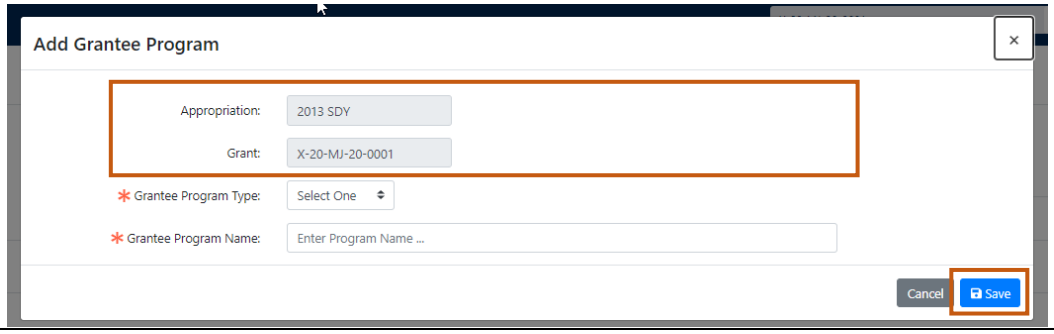


B2. Grantee | Add a Grantee Program

User Role: Grantee User	**Menu Option:** Add Grantee Program
Purpose: Allow Grantee Users to add a Grantee Program.	

Complete the following steps to add a Grantee Program:

1 Navigate to the **Manage My Grants** module and locate the **Grantee Programs** menu. See Section A1 above. Select **<Add Grantee Program>.** The "Add Grantee Program" page will load. The appropriation and Grant will default to the selected grant in the Navigation Bar. Complete all required fields marked with an asterisk (*).

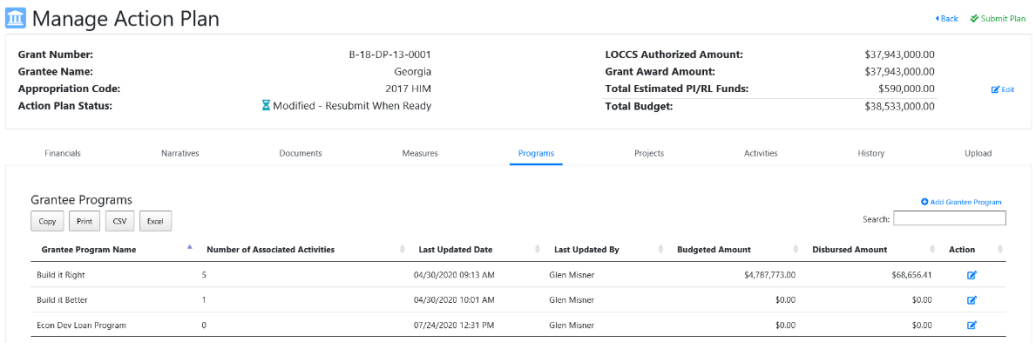


2 On the **"Add Grantee Program"** page, select the "Grantee Program Type" from the dropdown menu. Users may see one or many "Grantee Program Types" in the dropdown. Grantees may only create one Grantee Program per "Grantee Program Type" available.

User Role: Grantee User	**Menu Option:** Add Grantee Program

3 Enter a "Grantee Program Name." Grantees are encouraged to use a naming convention that resembles the "Grantee Program Type" or programs described in the Disaster Recovery Published Action Plan.

5 Alternatively, Grantee Programs can be added from the **"Manage Action Plan"** page "Programs" tab. Select **<Add Grantee Program>** and follow steps 1 – 4 in this Section B.1.



B3. Grantee | Edit a Grantee Program

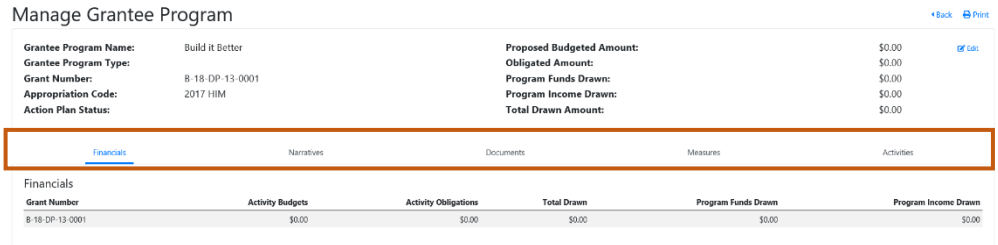
User Role: Grantee User	**Menu Option:** Search Grantee Programs

Purpose: Allow Grantee Users to edit an existing Grantee Program.

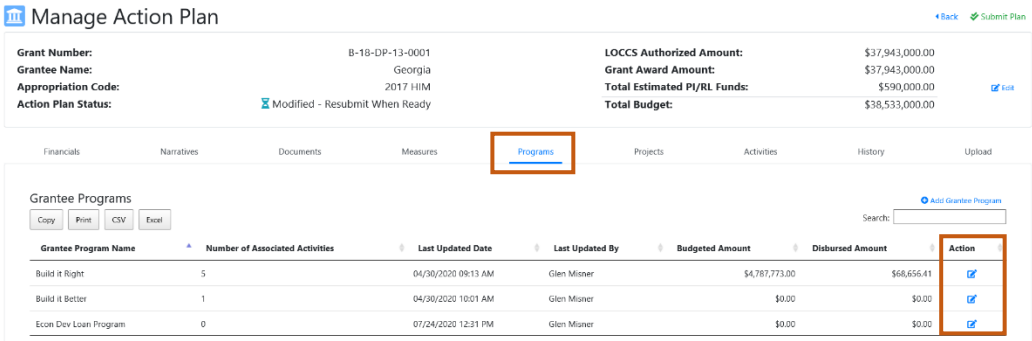
Complete the following steps to edit a Grantee Program:

1 Follow the steps in Section B1 to search for the Grantee Program that needs to be edited.

2 On the **"Manage Grantee Program"** page, select one of the five tabs from the **"Manage Grantee Program"** page to edit components of the Grantee Program. Each tab will load additional edit capabilities unique to that tab.



3 Alternatively, Grantee Programs can be edited from the **"Manage Action Plan"** page "Programs" tab. Follow steps 1 – 2 in this Section B.2.



Components of a Grantee Program

Financials	Provides cumulative financial data for all Activities associated with the Grantee Program.
Narratives	Allows Grantees to enter Program-level narratives, tables, and images.
Documents	Allows Grantees to attach supporting documents to the Grantee Program.
Measures	Provides cumulative accomplishment and beneficiary data for all Activities associated with the Grantee Program.
Activities	Allows Grantees to view/edit key data for every Activity associated with the Grantee Program.

B4. Grantee | Associate a Program to Activities

Once a Grantee Program is added, the next step is to associate the Program to one or multiple Activities related to that Program. Once the association is made, all the Activity related data will be aggregated and displayed at the Program level under the "Programs" tab of the **"Manage Action Plan"** page.

Each Grantee Program Type is pre-loaded by a DRGR Superuser and is associated with certain Activity Types (see Section 14. For example, a "Housing" Grantee Program Type may be limited to housing Activity Types such as housing new construction or rehabilitation/reconstruction. Therefore, each Activity's "Activity Type" will dictate the "Program" available to associate.

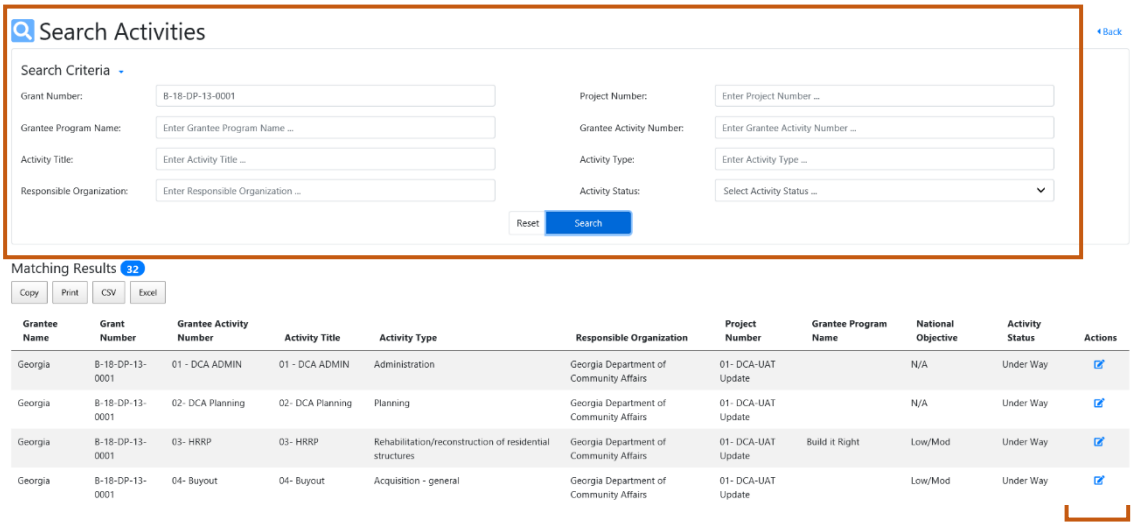
TIP! If the "Grantee Program" dropdown of the "Edit Activity Details" page does not show a Grantee Program, then the "Activity Type" is not compatible with any Programs available.

User Role: Grantee User	**Menu Option:** Search Activities

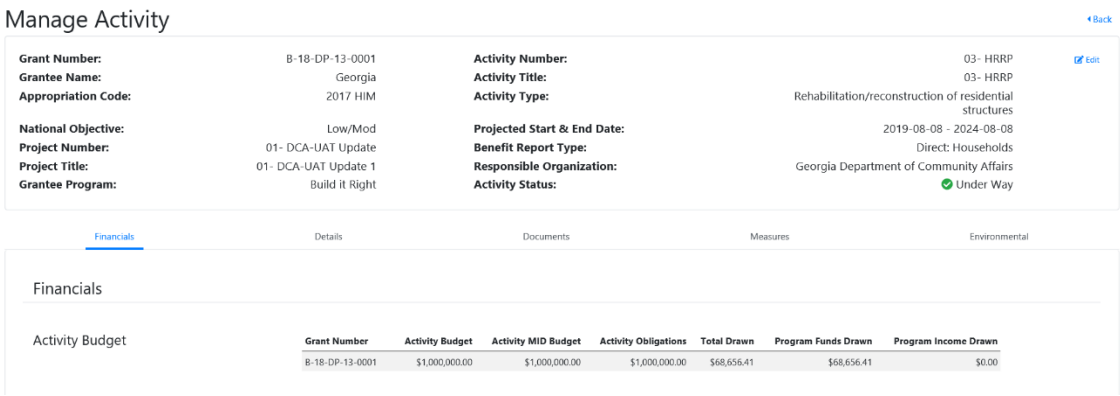
Purpose: Allow Grantee Users to associate Programs to Activities.

Complete the following steps to associate Programs to Activities:

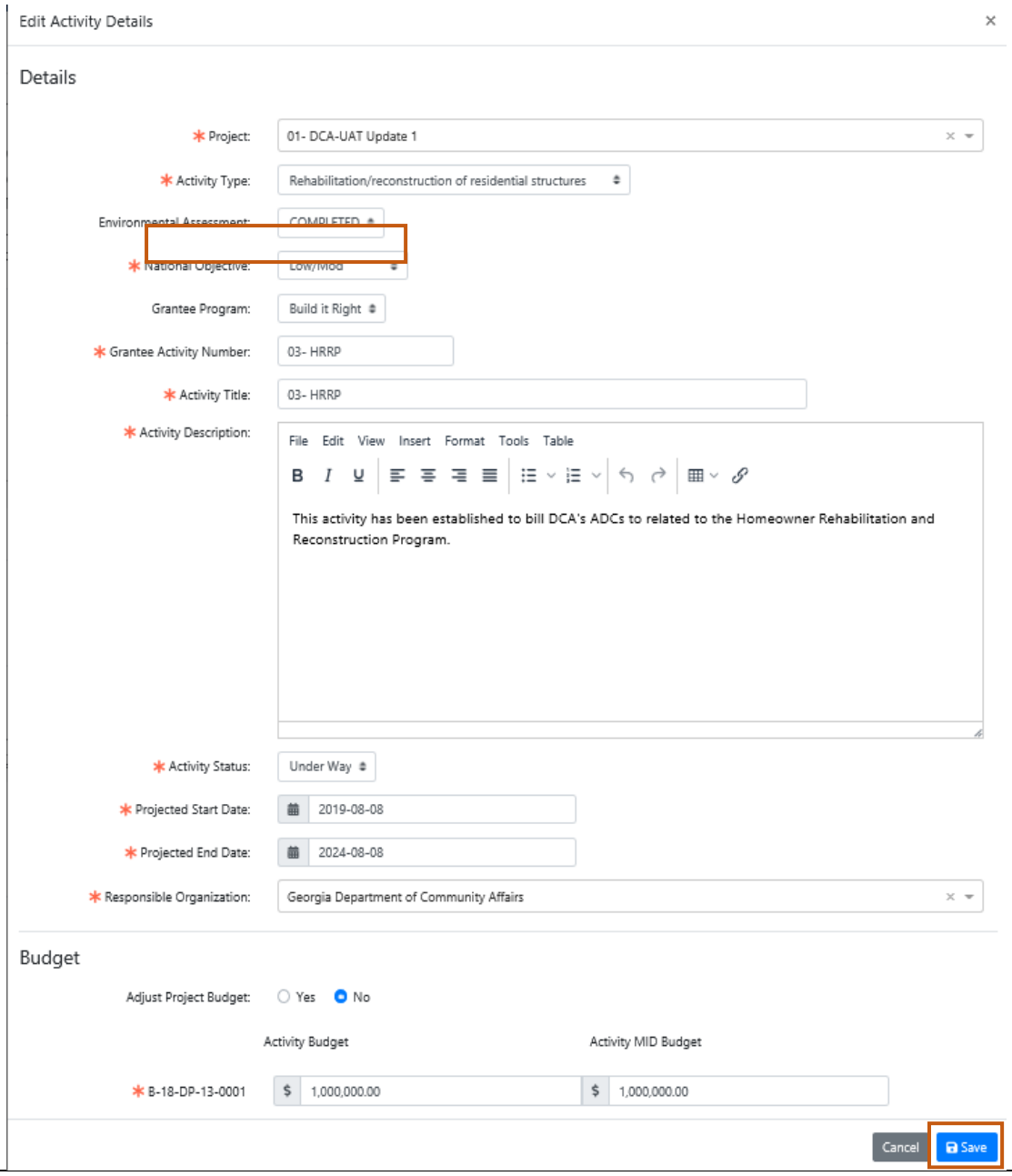
1 Navigate to the **Manage My Grants** module and locate the **Activities** menu. Select **<Search Activities>.** Enter search criteria and select **<Search>**. Search results will load. Select the Activity to associate to a Grantee Program by selecting the **<Action>** icon.



2 The **"Manage Activity"** page will load. Select **<Edit>** next to the Manage Activity header.



3 The **"Edit Activity Details"** page will load. Select a "Grantee Program" from the dropdown menu and select **<Save>** to complete the process. DRGR will return to the **"Manage Activity"** page.



The remainder of this page is intentionally left blank.

B5. Grantee | Delete a Grantee Program

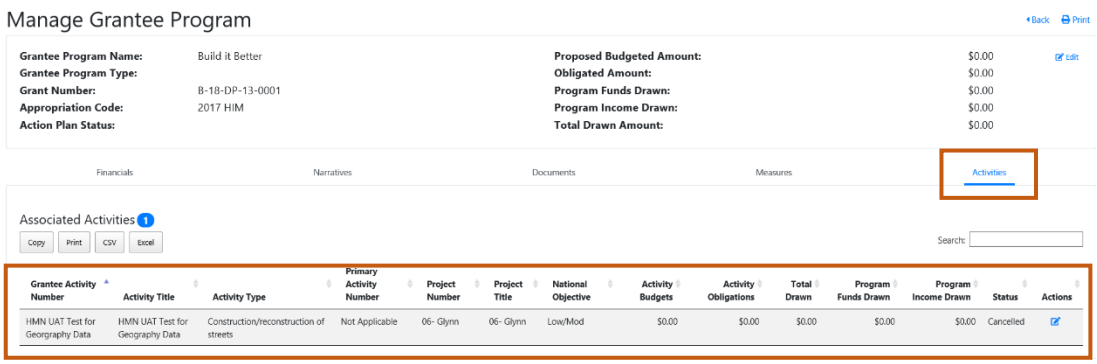
Action Plan Grantee Programs can be deleted if they were erroneously created or are no longer needed. To delete a Grantee Program from the DRGR System, all Activities associated with the Grantee Program must be removed to allow for a Grantee User to delete an existing Grantee Program.

User Role: Grantee User	**Menu Option:** Search Grantee Programs
Purpose: Allow Grantee Users to delete an existing Grantee Program.	

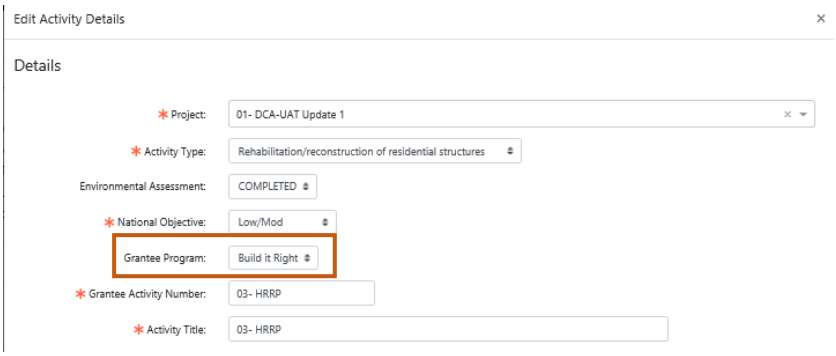
Complete the following steps to delete a Grantee Program:

1 Follow the steps in Section B1 to search for the Grantee Program that needs to be edited.

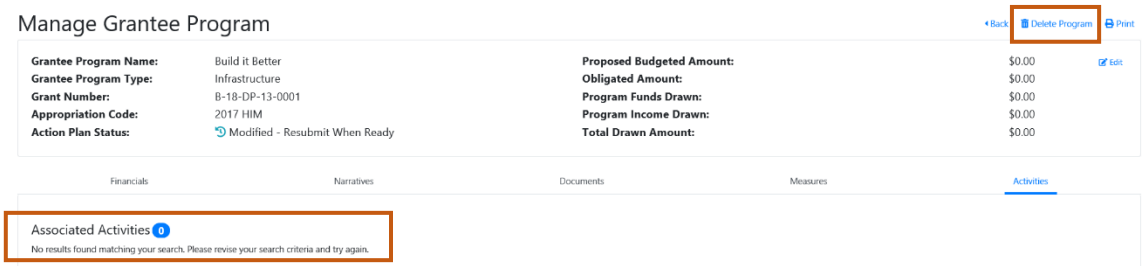
2 One the **"Manage Grantee Program"** page, navigate to the "Activities" tab and select **<Action>** next to every activity shown to de-associate the Activity with the Grantee Program.



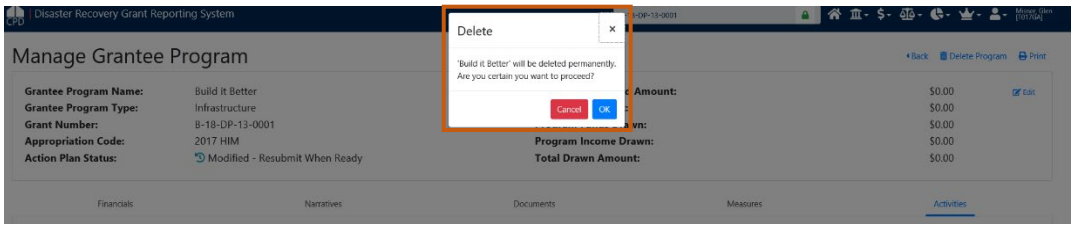
3 The **"Edit Activity Details"** page will load. Change the "Grantee Program" dropdown menu choice to "Select One" and select **<Save>** at the bottom of the page. Repeat Step 3 until all associated Activities are removed.



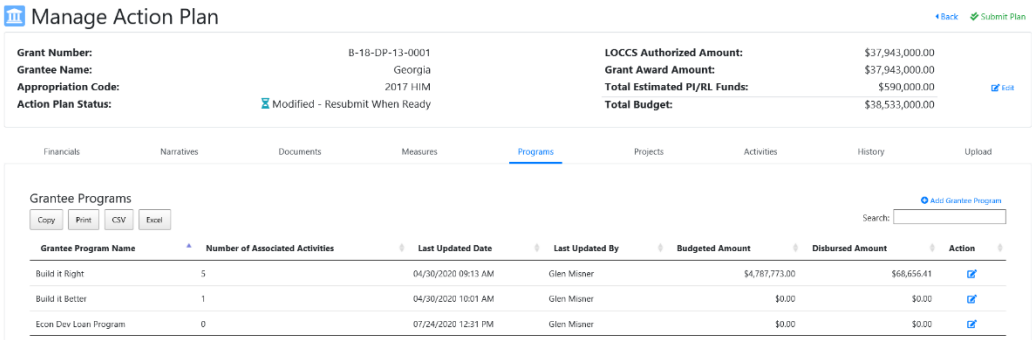
4 Once all associated Activities are removed, select **<Delete Program>** on the **"Manage Grantee Program"** page.



5 A prompt will load indicating the Grantee Program will be deleted permanently. Select **<Ok>** to delete the Program.



6 Alternatively, Programs can be deleted from the **"Manage Action Plan"** page "Programs" tab. After navigating to the to the **"Manage Action Plan"** page "Programs" tab, select the **<Action>** icon to load the **"Manage My Programs"** page for the desired program. Follow steps 2 – 5 in this Section B.4.



Chapter 14: Activities | Manage My Grants Module

_**Chapter 14: Activities | Manage My Grants Module** 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Overview of Activities 3

B1. Activity Details 3

B2. Additional Activity Details 6

C. Add, Edit, and View Activities 9

C1. Grantee | Add Activity 9

C2. Grantee and HUD | Search and View Activity 13

C3. Grantee | Edit Activity 14

D. Manage Activity: Financials 15

D1. Grantee | Activity Budget 16

D2. Grantee | Activity Funding Source 17

D3. Grantee | Activity Responsible Organization Budgets 19

E. Manage Activity: Details 21

E1. Grantee | Activity Description 21

E2. Grantee | Activity Location 22

E3. Grantee | Activity Drawdown Blocks 25

E4. Grantee | Associate Activities 26

F. Manage Activity: Documents 27

F1. Grantee | Activity Supporting Documents 28

G. Manage Activity: Measures 30

G1. Grantee | Activity Benefitting Reporting Performance – Direct Benefit 31

G2. Grantee | Activity Benefitting Reporting Performance – Area Benefit (Census) 32

G3. Grantee | Activity Benefitting Reporting Performance – Area Benefit (Survey) 35

G4. Grantee | Proposed Accomplishments 37

G5. Grantee | Proposed Beneficiaries 38

H. Manage Activity | Environmental 39

H1. Grantee | Environmental Assessment 39

H2. Grantee | Environmental Reviews 40

I. Delete and Restore Activities 41

I1. Grantee | Delete Activity 41
I2. Grantee | Restore Deleted Activity 42

Chapter 14: Activities | Manage My Grants Module

This Chapter provides procedures to add, edit, view, and delete Activities contained in the **Manage My Grants** module. DRGR users associated with a technical assistance (TA) provider should use the "View Procedures" within this Chapter. However, DRGR users associated with a TA provider must add, edit, and delete activities using the DRGR work plan functions in DRGR. Technical assistance providers should review Chapter 17 for procedures related to managing work plans.

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

Grantee Users

Menu Option	Subsection	Action
Add Activity	C1	Add a new Activity to the Action Plan
Search Activities	C2 – I1	Search, view, and edit existing Activities
Restore Activities	I2	Restore Activities that were previously deleted

HUD Users

Menu Option	Subsection	Action
Search Activities	C2	Search and view Grantee Activities

A. Manage My Grants Module Access

The **Manage My Grants** module contains all actions related to Activities in DRGR.

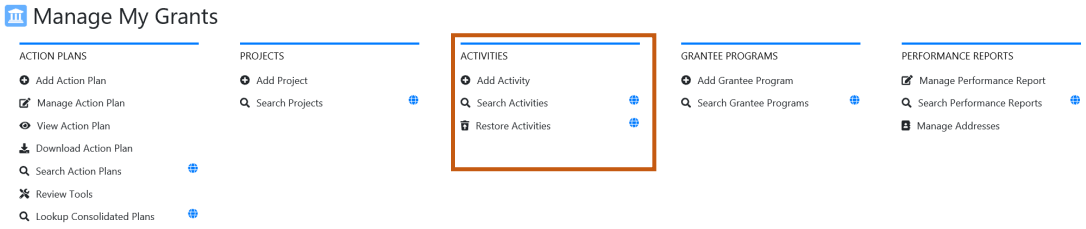
A1. Grantee | User Access

User Role: Grantee Users	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan Activity actions.	
Complete the following steps to acess the Manage My Grants Module:	

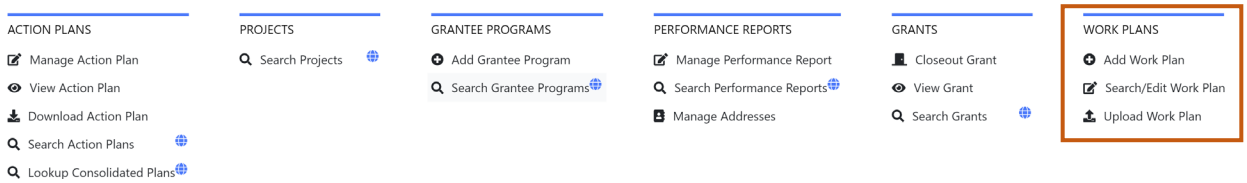
1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation bar.

User Role: Grantee Users	**Menu Option:** Manage My Grants Module

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



TA Provider Users will see these menus:



A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Grants Module

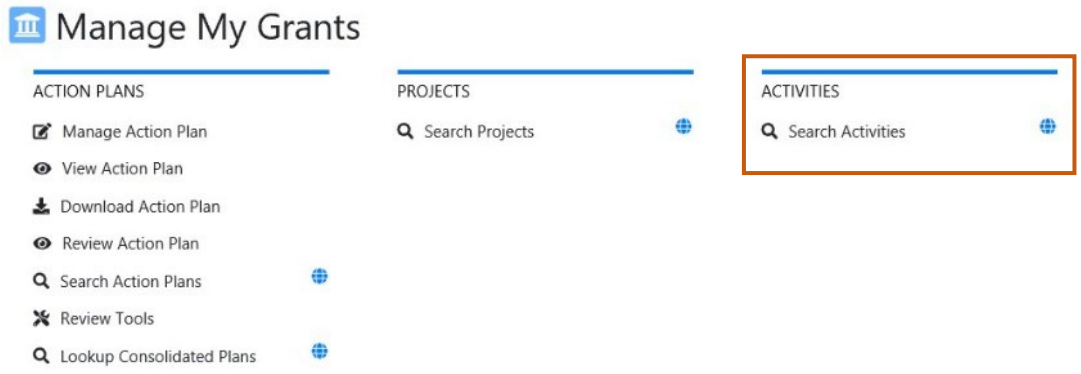
Purpose: Allow HUD Users to access Action Plan Activity actions.

Complete the following steps to acess the Manage My Grants Module:

1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation bar.

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

User Role: HUD User	**Menu Option:** Manage My Grants Module



B. Overview of Activities

DRGR Activities allow Grantees to, at minimum:

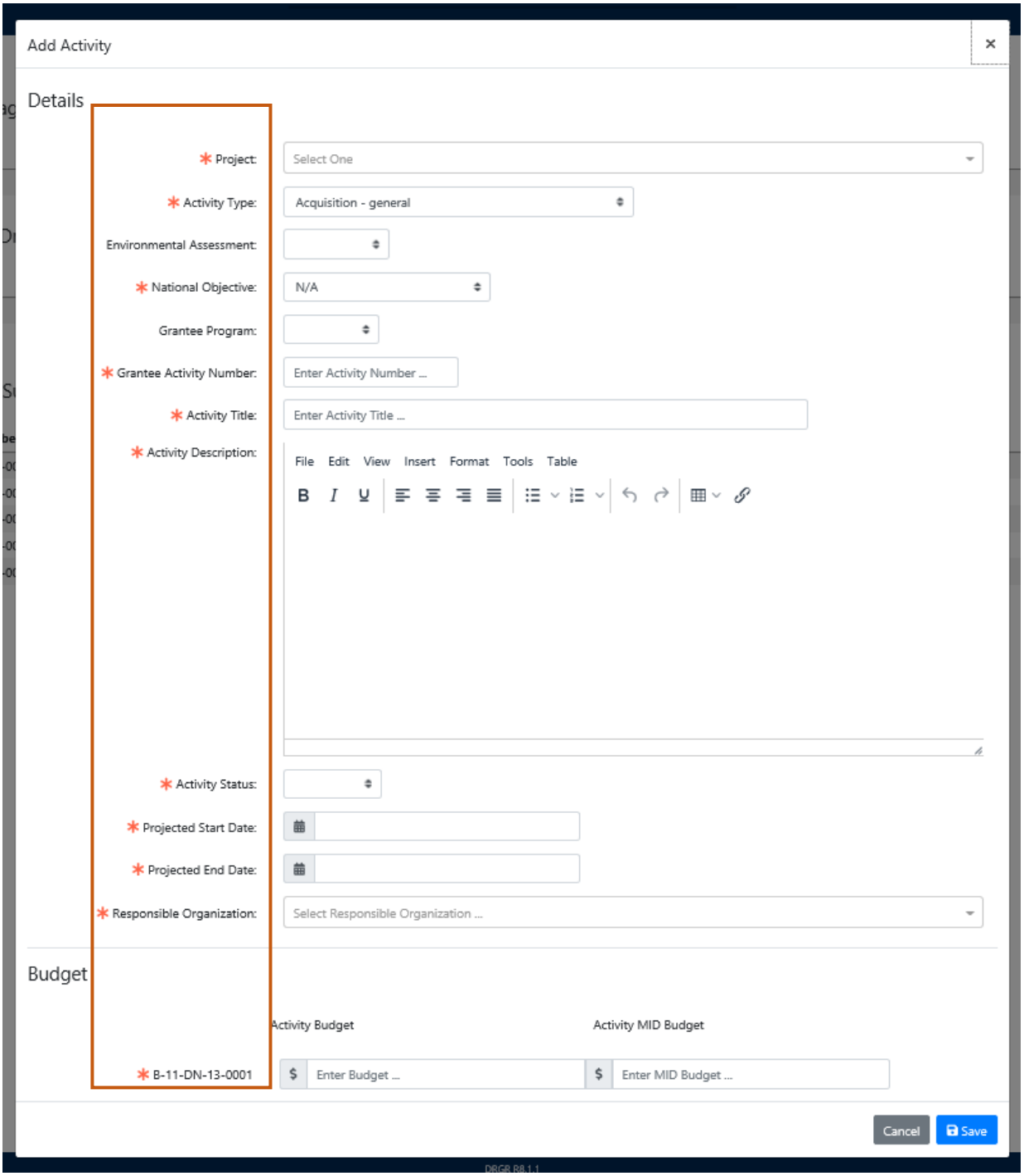
- Define and describe local, "on-the-ground" Grant-funded projects
- Demonstrate the activity is eligible per program regulations
- Demonstrate how the activity meets a National Objective
- Report the outcomes and accomplishments of the activity
- Drawdown funds from the Line of Credit Control System (LOCCS)
- Report on other program requirements

B1. Activity Details

Due to the importance of DRGR activities, there are several components Grantees must navigate to meet minimum reporting requirements in the DRGR System. The following figure depicts the required components of every DRGR activity (required fields are marked with an asterisk (*)). For activities associated with TA provider awards, when the users complete the Work Plans, these components are captured and populated on the **"Manage Activity"** page as read only data (see Chapter 17 – Technical Assistance Work Plans).

The remainder of this page is intentionally left blank.

Activity Details



Activity Details

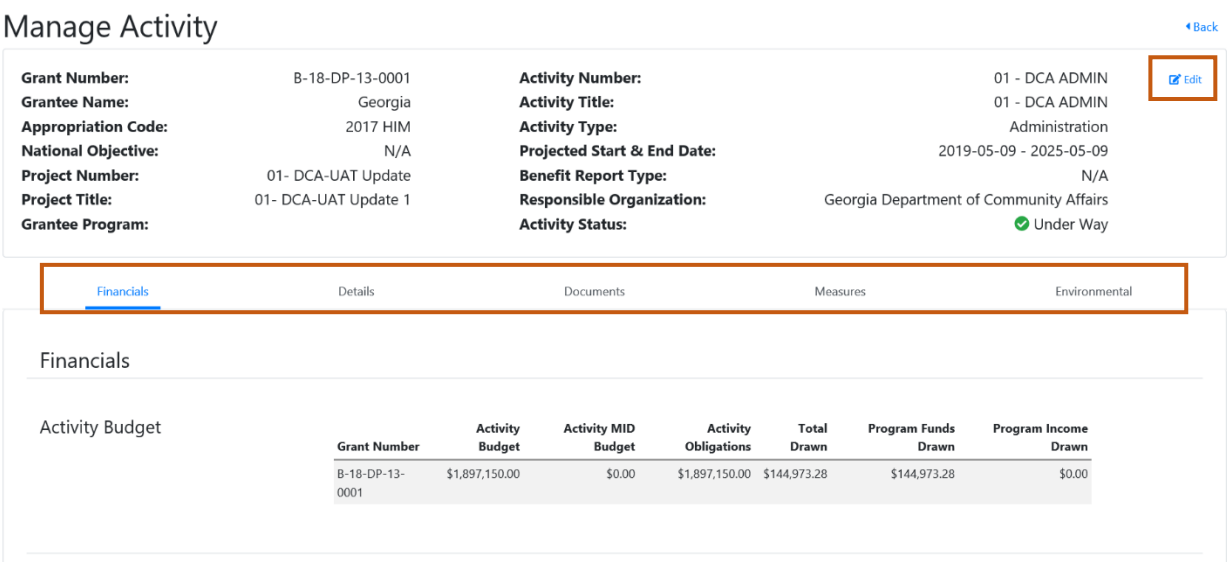
Project*	Every activity must be associated to a project (see Chapter 12). The sum of activity budgets within a project cannot exceed the total project budget.
Activity Type*	Activity types correlate to eligible activities as defined in program regulations or award terms and conditions. Available activities will depend on the eligible uses under a given appropriation. The selection of the correct activity type is important since it will dictate which unique performance measures can be reported for that activity. For example, the "Construction of New Housing" Activity Type will allow Grantees to report housing performance measures, whereas the "Economic Development" Activity will allow Grantees to report jobs creation and retention.
Environmental Assessment	Not required but recommended for awards not associated with the TA provider Grantee type in DRGR. The Environmental Assessment provides the status of the environmental review for the activity (Exempt, Underway, or Completed).
National Objective*	National Objectives are a requirement of the program statute or award terms and conditions. One hundred percent of CDBG-DR and NSP funds, for example, must meet a National Objective, with the exception of Administration and Planning costs. If a Grantee selects the "Low/Mod" National Objective for a single-family housing rehabilitation program, HUD expects to see only Low/Mod Households reported as beneficiaries for that activity (projected in the "Measures" Tab).
Grantee Program	Not required, and only available for select Grantees (see Chapter 13). Associating activities to Grantee Programs enables unique reporting that is meant to align with Grantees' Published Action Plan more closely.
Grantee Activity Number*	Activity Numbers allow Grantees to create a unique numbering system for each DRGR activity. Activity Numbers can mirror local billing codes, for example, or describe the activity's key characteristics (e.g., "SB-Housing-LMMI" = Santa Barbara County's Housing Program for Low- and Moderate-Income Households). For activities associated with a TA provider Grantee type, the activity number must match the numbering convention directed by HUD.
Activity Title*	Activity Titles allow Grantees to create a unique title for each DRGR activity. Using the example above, the Activity Number may be "SB-Housing-LMMI" whereas the Activity Title may be "Santa Barbara County's LMMI Housing Rehab Program."
Activity Description*	Activity descriptions should provide a brief description of the activity the Grantee is proposing. This is the best opportunity to describe the "on-the-ground" Grant-funded project to HUD and the public.

Activity Status*	The Activity Status includes: Planned, Underway, Completed, or Cancelled. Grantees can mark an activity as "Planned" if the Grantee is waiting for the completion of the environmental review or selection of a developer, for example. In contracts, an activity can be marked as "Completed" to indicate no further drawdowns or accomplishment reporting will take place. Grantees can only drawdown funds for activities in "Underway" status. For activities associated with a TA provider Grantee type, the activity status is based on the approval status of the work plan.
Projected Start Date*	The projected start date indicates when the activity is expected to start.
Projected End Date*	The projected end date indicates when the activity is expected to be completed. If a projected end date passes, Grantees must update the projected end date to avoid DRGR Flags (see Chapter 32). Projected End Dates also help measure the timely expenditure of funds and applicable expenditure deadlines. This information can be revised and updated.
Responsible Organization*	Every DRGR activity must have a single, Responsible Organization assigned (see Chapter 6). The Responsible Organization is the entity responsible for carrying out, or implementing, the activity. The Grantee may select itself, for example, as the Responsible Organization for an activity that is implemented directly, whereas, the Grantee may select a subrecipient as the Responsible Organization if a subrecipient is sub-awarded Grant funds to implement its own activity directly. Remember that Responsible Organizations need to be entered into DRGR by a Grantee just once and can be used across activities and Grants (see Chapter 6).
Budget*	The Activity Budget represents the amount of Grant Funds and Program Income committed to the DRGR Activity. The System prevents Grantees drawing funds in excess of the Activity Budget.
MID Budget	The Most Impacted and Distressed (MID) Budget is applicable to CDBG-DR Grantees only and represents the amount of the Activity Budget that is expected to be spent in MID Areas.

B2. Additional Activity Details

In addition to the Activity Details described above, each DRGR activity has several other components that must be completed. After completing and saving the Details for an activity, users add the additional components from the **"Manage Activity"** page, which is accessible by following the steps described in Section C2 below to Edit Activities. The following tabs are available on the **"Manage Activity"** page. For activities associated with TA provider awards, when the users complete the Work Plans, these components are captured and populated on the **"Manage Activity"** page as read only data (see Chapter 17 – Technical Assistance Work Plans).

Additional Activity Details



Additional Activity Details

Activity Details	Activity Details	Allows Grantees to edit the components of an activity described above on the **"Activity Details"** page by selecting **<Edit>** next to the "Manage Activity" title bar.
Financials Tab	Activity Budget	Provides a summary of financial data and transactions. Note that the Activity Budget is edited on the **"Activity Details"** page described above.
	Activity Funding Sources	Not required but recommended. Allows Grantees to report match and leveraged sources of funds.
	Activity Responsible Organization Budgets	Optional. The DRGR System defaults to assigning the entire Activity Budget to the selected Responsible Organization. Grantees may assign a portion of the Activity Budget to one or more "subordinate responsible organizations" to report the budgets for partners and other key organizations involved in implementing the activity.
Details Tab	Activity Description	Activity descriptions should provide a brief description of the activity the Grantee is proposing. This is the best opportunity to describe the "on-the-ground" Grant-funded project to HUD and the public.
	Activity Location	Provide a brief description of the activity location (e.g., King County or the Joplin Senior Center).

	Activity Drawdown Blocks	Optional. Allows Grantee Administrators to block other Grantee Users from creating and approving vouchers for the activity. Also displays if HUD has placed a current or future block, preventing all Grantee Users from creating and approving vouchers for the activity.
	Associate Activities	Optional. Allows Grantees to display related activities in the DRGR Action Plan and QPR. For example, if a Grantee is implementing a housing rehabilitation program that meets the "Low/Mod" and "Urgent Need" National Objectives, necessitating two DRGR activities for the same program separated by National Objective, the Grantee may "Associate" the two activities to show the relationship.
Documents Tab	Activity Supporting Documents	Optional. Allows Grantees to upload documents (e.g., Service Area map) to support the DRGR activity. These documents are only viewable in the DRGR System.
Measures Tab*	Benefiting Reporting Performance	These measures are key to demonstrating compliance with the eligible Activity Type and National Objective (e.g., "Number of Owner Households" for an owner-occupied housing rehab program, or "Number of Multifamily Units" if the activity will result in the creation of new multifamily units).
	Proposed Accomplishments	These measures typically represent the physical outcomes of the activity (e.g., "Number of Single-Family Housing Units" created, or "Number of Substantial Rehabilitations" completed.) Grantees are only required to provide projections for the measures required by program regulations. Any measures projected in the Action Plan will show up in the QPR for reporting. This is true even for entries of "0". Leave accomplishments blank if not required.
	Proposed Beneficiaries	These measures represent the beneficiaries of the activity (e.g., the "Number of Renter Households" assisted or "Number of New Jobs" created.)
Environmental Tab	Environmental Assessment	Optional but recommended. Grantees should select either Exempt, Competed, or Underway based on the status of the environmental review.
	Environmental Reviews	Optional; not available to State Grantees. Allows Grantees to associate the activity with a HEROS Environmental Review.

**Failure to select and propose accomplishments in the Activity "Measures" Tab will prevent Grantees from being able to report those accomplishments in the performance report (see Chapter 19).*

C. Add, Edit, and View Activities

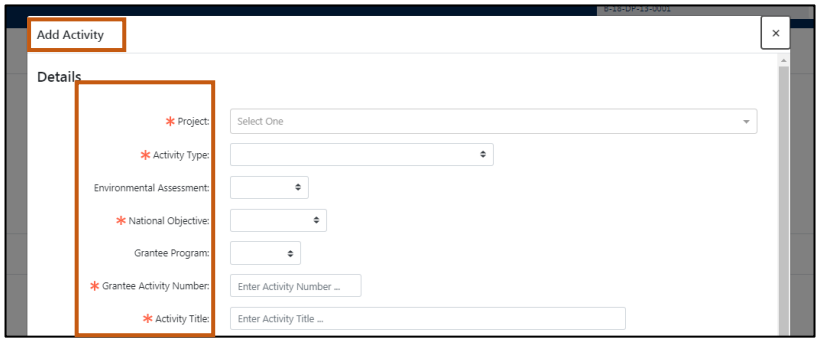
After Projects are added in DRGR, users can then add Activities and associated the Activities with Projects. The primary purpose of Activities is to report accomplishment data and conduct financial transactions.

Grantees should work with their CPD Representative to map out how their Projects and Activities will be structured to ensure the most efficient and effective programmatic and financial reporting prior to setting up their Projects and Activities in DRGR.

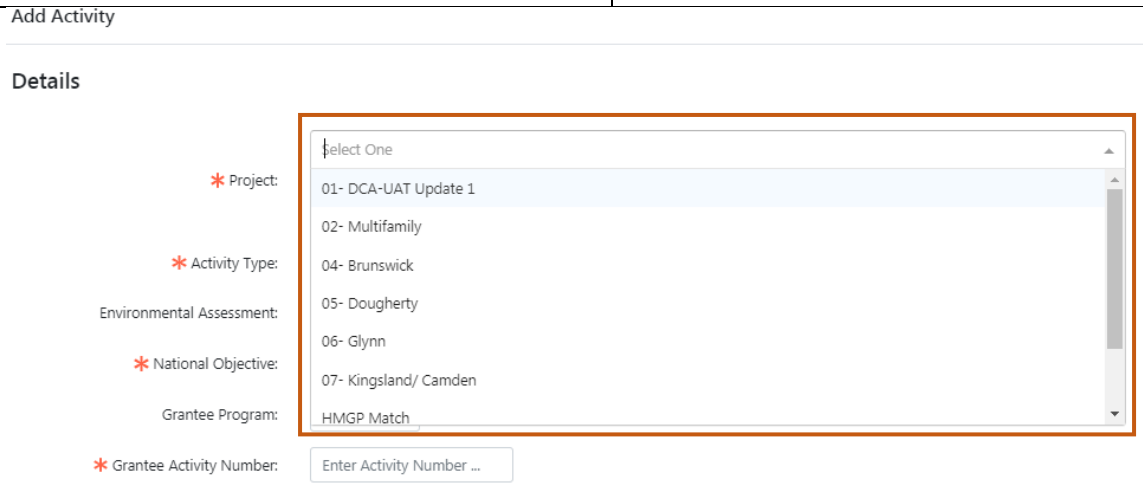
TIP! Grantees cannot drawdown funds for a newly created DRGR activity until the Action Plan is reviewed and approved by HUD.

Reminder: DRGR users associated with a technical assistance provider should refer to Chapter 17 to manage work plans, which serve to populate the Action Plan as activities. As such, unless otherwise noted, only the view and search functions apply throughout this section.

C1. Grantee | Add Activity

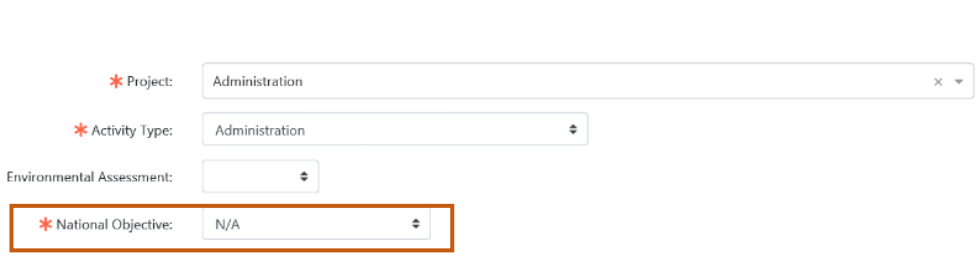
User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Add Activity
Purpose: Allow Grantee Users (excluding TA Provider Users) to add an Activity to an Action Plan.	
Complete the following steps to add an Activity to an Action Plan:	
1 Navigate to the **Manage My Grant** module and locate the **Activities** menu. Select **<Add Activity>** and the **"Add Activity"** page will load. Complete, at minimum, all required fields marked with an asterisk (*). 	
2 The "Project" field opens a dropdown of Projects already created for the current Action Plan. Select the desired Project for the Activity. Grantees must first create Projects before creating Activities (see Chapter 12).	

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Add Activity



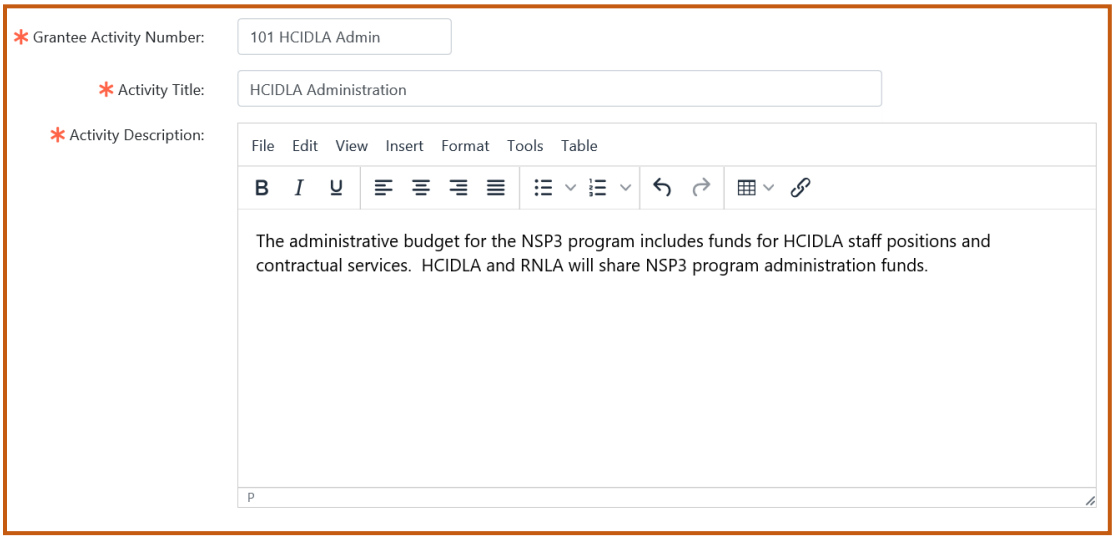
3 The "Activity Type" field opens a dropdown menu based on eligible uses associated with the appropriation. Select the Activity type based on the "end use" of the Activity.

4 The "National Objective" field opens a dropdown menu of National Objectives associated with the appropriation. Select the desired National Objective. "N/A" should be selected for Administration and Planning activities only.

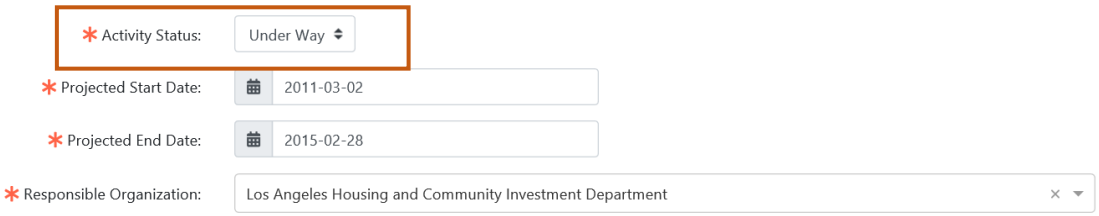


User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Add Activity

5 The "Grantee Activity Number," "Activity Title,", and "Activity Description" are details customized by the Grantee. See Section B2 above for tips on naming conventions.



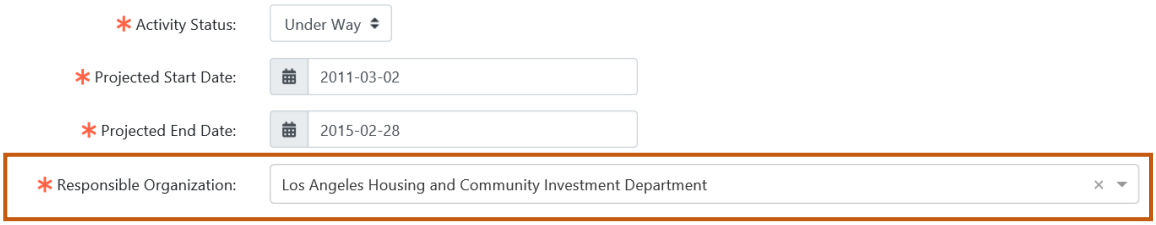
6 The "Activity Status" field opens a dropdown menu. Users must select "Planned," "Under Way," "Cancelled," or "Completed." See tips in Section B2 above for selecting the appropriate status.



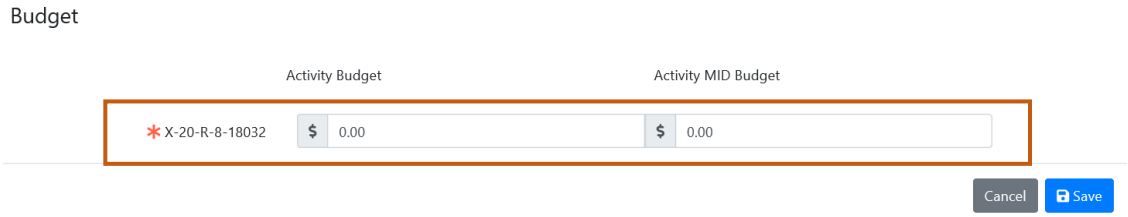
7 The "Projected Start Date" and "Projected End Date" should be entered in the appropriate fields using the following format "YYYY-MM-DD."

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Add Activity

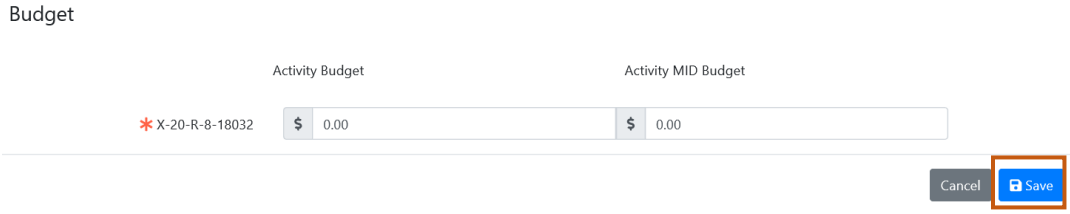
8 The "Responsible Organization" field opens a dropdown of Responsible Organizations that were added prior to designation at the Activity level (see Chapter 6). Select the desired Responsible Organization.



9 The "Activity Budget" and "Activity MID Budget" (CDBG-DR Grantees only) should be entered into the appropriate fields and must include Program Funds (Grant funds) and Program Income.

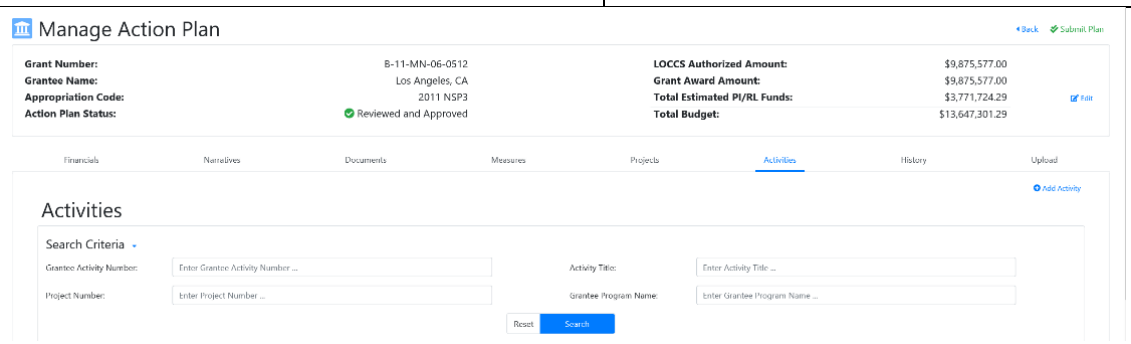


10 Select the **<Save>** button on the bottom right of the screen once all information has been added.



11 Alternatively, Activities may be added from the **"Manage Action Plan"** page's "Activities" tab by selecting **<Add Activity>.** To access the **"Manage Action Plan"** page, navigate to the **Manage My Grant** module, locate the **Action Plan** menu, and select the **<Manage Action Plan>** link. The **"Manage Action Plan"** page will load.

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Add Activity



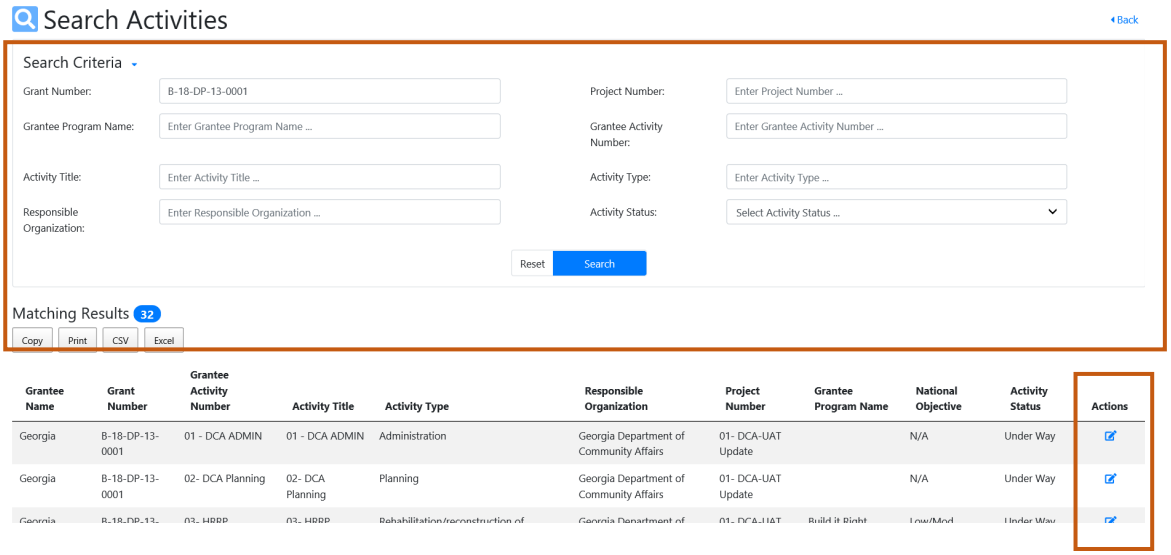
C2. Grantee and HUD | Search and View Activity

User Role: Grantee and HUD Users	**Menu Option:** Search Activities

Purpose: Allow Grantee and HUD Users to search and view an existing Activity.

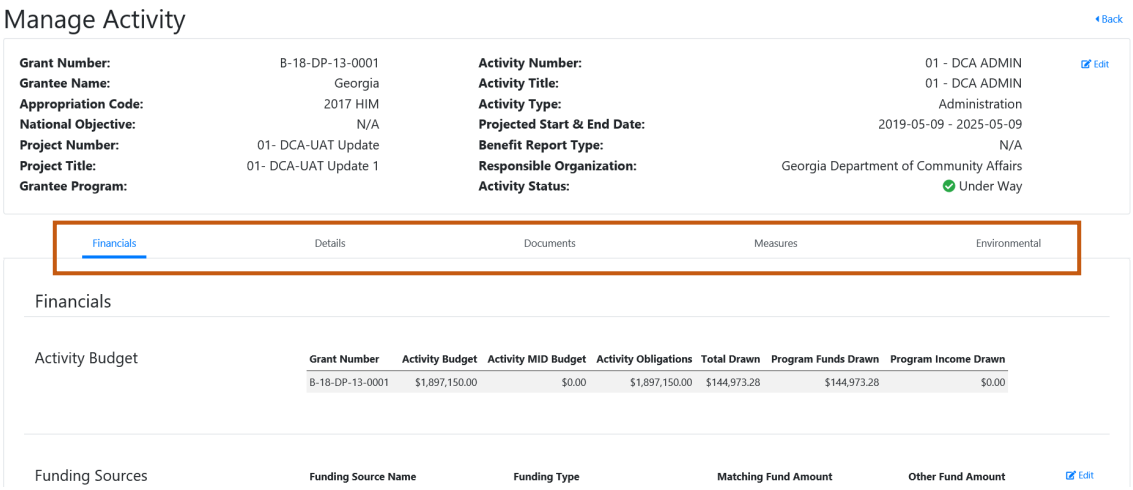
Complete the following steps to search for an existing Activity:

1 Navigate to the **Manage My Grant** module, locate the **Activities** menu, and select **<Search Activities>**. The **"Search Activities"** page will load. Enter search criteria and select **<Search>**. Search results will load. To view an existing Activity, select the **<Action>** next to the desired Activity. The **"Manage Activity"** page will load.



User Role: Grantee and HUD Users	**Menu Option:** Search Activities

2 On the **"Manage Activity"** page, navigate the edit function or Activity tabs to view components of the activity.



C3. Grantee | Edit Activity

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to edit an existing Activity.

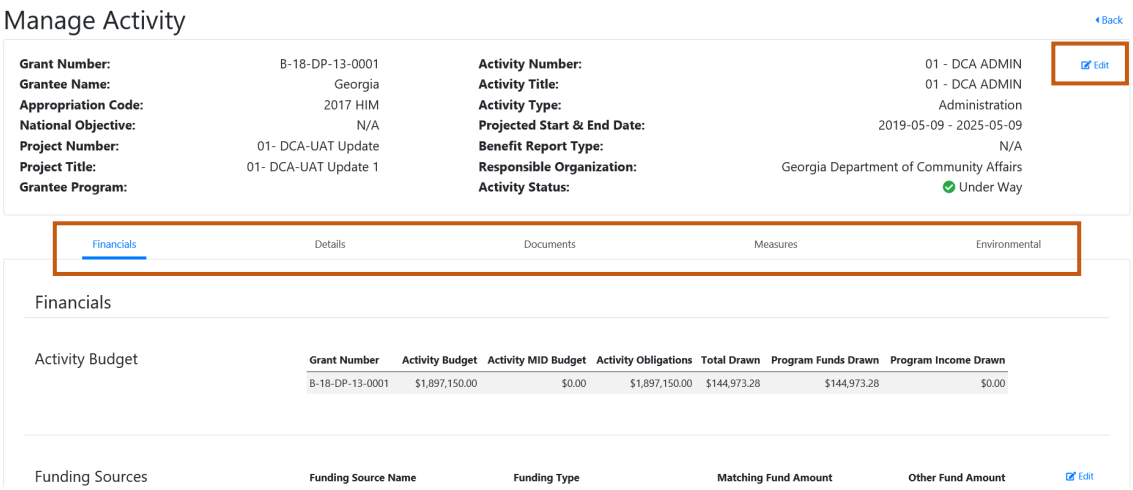
Complete the following steps to edit an existing Activity:

1 Follow the steps in Section C2 to search for an activity.

The remainder of this page is intentionally left blank.

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Search Activities

2 On the **"Manage Activity"** page, select **<Edit>** to modify Activity Details. Navigate the Activity tabs to edit components of the activity.



D. Manage Activity: Financials

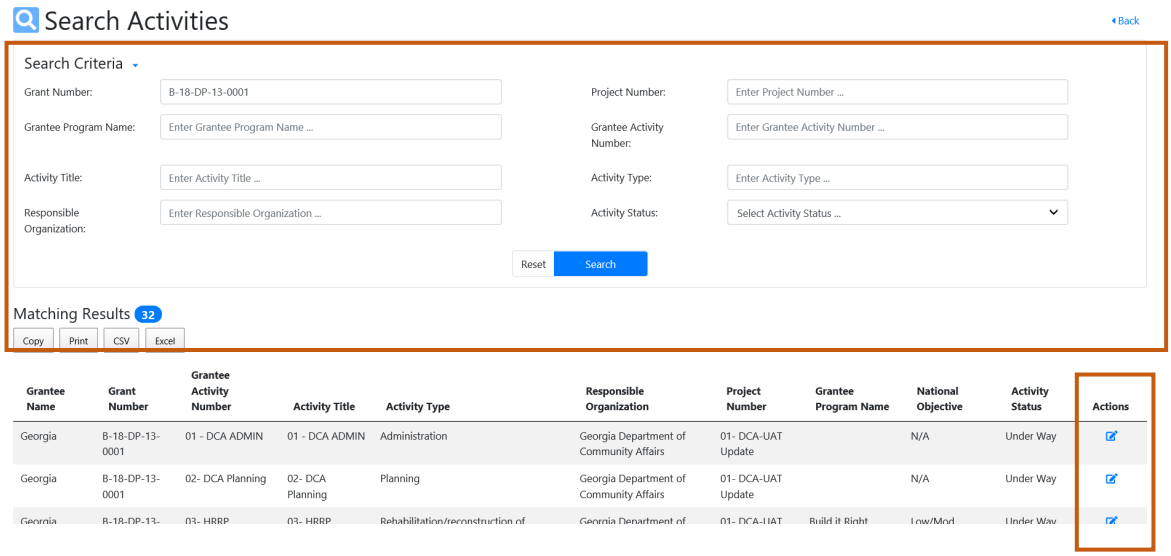
This Section provides procedures for navigating the "Financials" tab of the **"Manage Activity"** page. In this Section, the edit functions are not applicable to DRGR users associated with a technical assistance provider.

User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to access the **"Manage Activity"** page.	

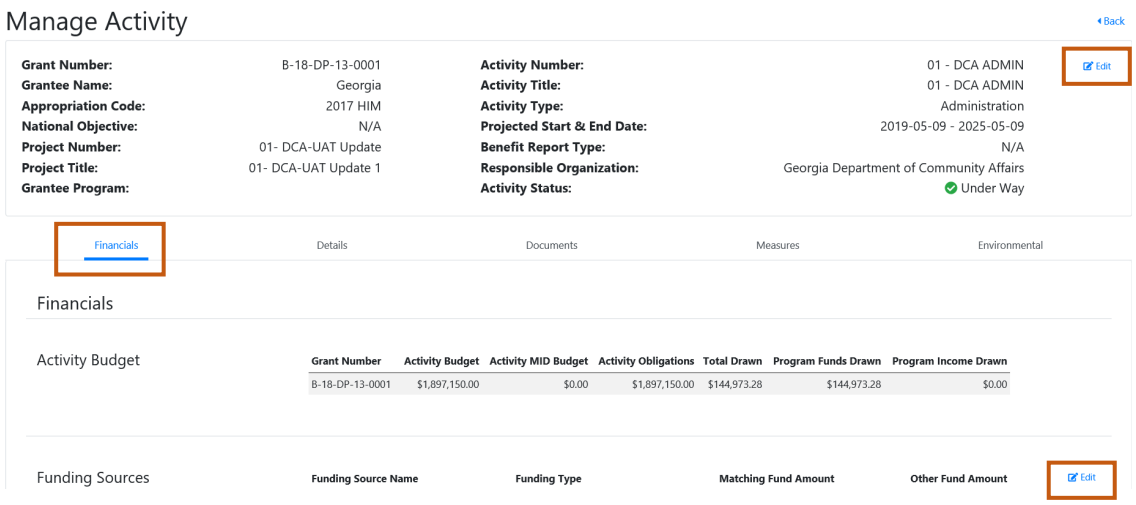
Complete the following steps to acess the "Manage Activity" page:

1 Navigate to the **Manage My Grant** module, locate the **Activities** menu, and select **<Search Activities>**. The **"Search Activities"** page will load. Enter search criteria and select **<Search>**. Search results will load. To view an existing Activity, select the **<Action>** next to the desired Activity.

User Role: Grantee Users	**Menu Option:** Search Activities



2 The **"Manage Activity"** page will load and default to the "Financials" tab. From this tab, users can edit Funding Sources by selecting **<Edit>** next to "Funding Sources." Note that the Activity Budget and MID Budget are view only on the "Financials" tab and can be edited by selecting **<Edit>** next to the "Manage Activity" Title Bar.



D1. Grantee | Activity Budget

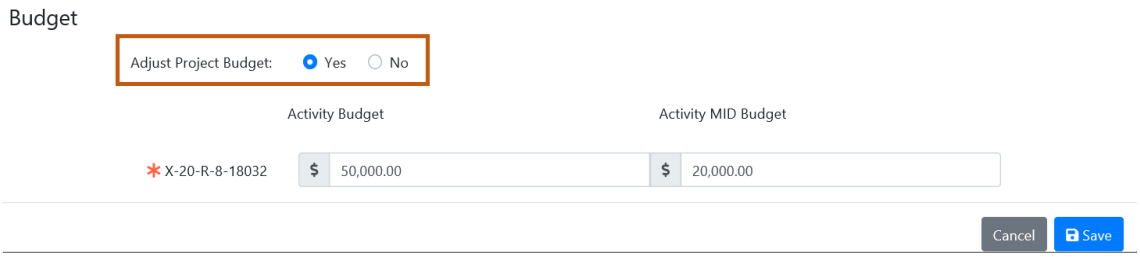
User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to manage an Activity's budget.	

User Role: Grantee Users	**Menu Option:** Search Activities

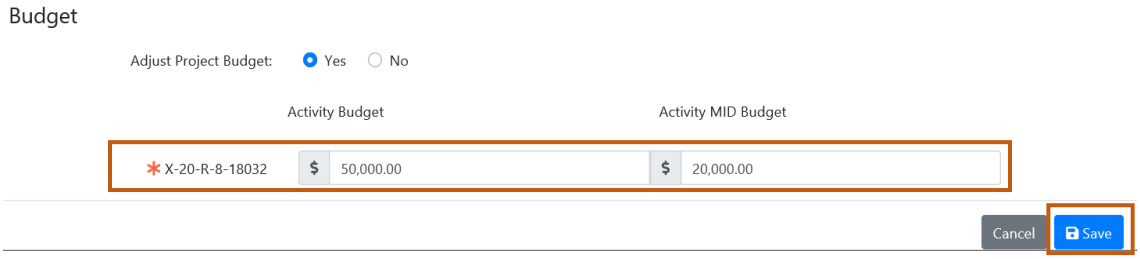
Complete the following steps to manage an Activity's budget:

1 Follow the steps in Section C2 to search for an activity.

2 On the **"Manage Activity"** page. select **<Edit>** next to the "Manage Activity" Title Bar. The **"Edit Activity Details"** page will load. Scroll down to the "Budget" section. If the Project for the Activity was changed, and you would like the giving and receiving Project Budgets to be adjusted by the Activity Budget, select the **<Yes>** radio button next to "Adjust Project Budget." This will reduce the original Project Budget by the Activity Budget amount and increase the new Project Budget by the Activity Budget amount. Only select this option if the new Project Budget does not already account for the incoming Activity Budget.



3 Enter the revised "Activity Budget" and/or "Activity MID Budget" (if applicable) and select **<Save>.**



D2. Grantee | Activity Funding Source

User Role: Grantee Users	**Menu Option:** Search Activities

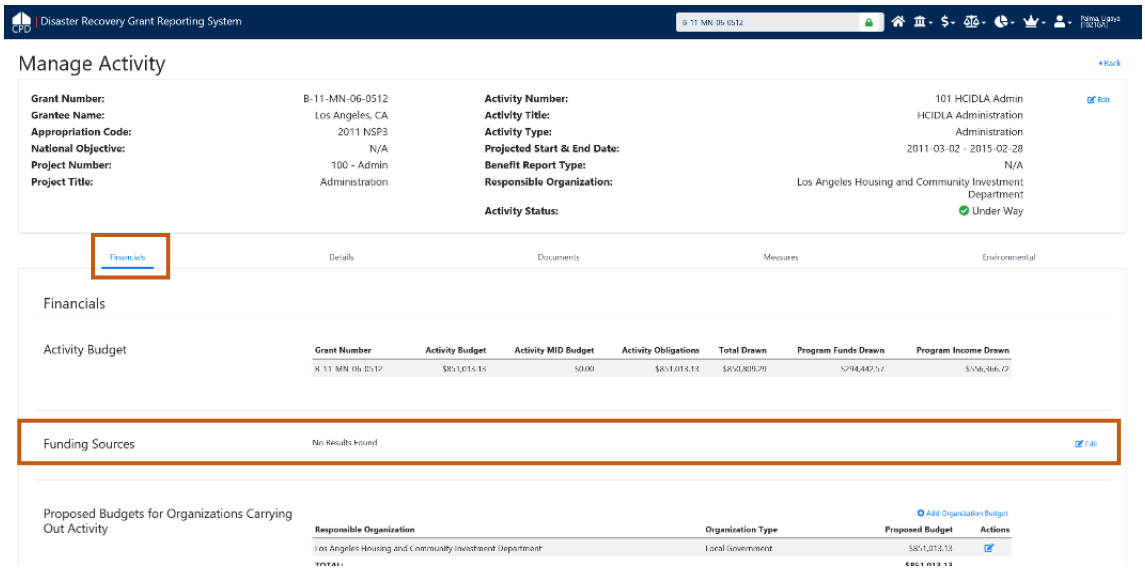
Purpose: Allow Grantee Users to manage an Activity's funding source(s).

Complete the following steps to manage an Activity's funding source(s):

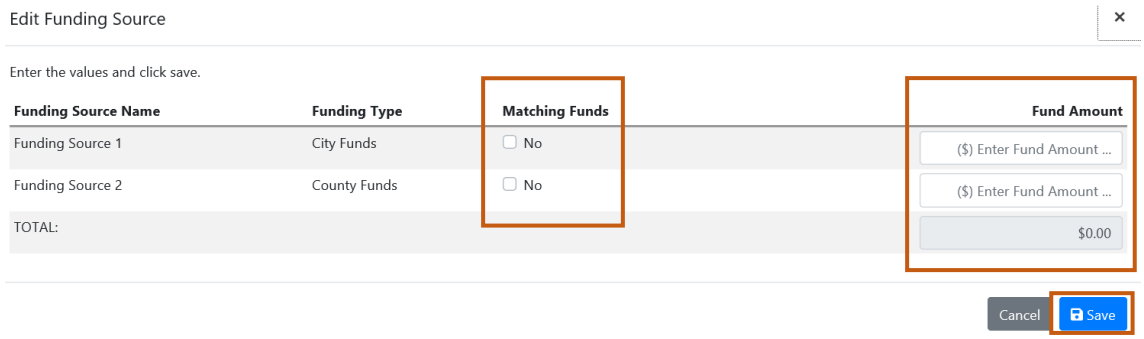
1 Follow the steps in Section C2 to search for an activity.

User Role: Grantee Users	**Menu Option:** Search Activities

2 On the **"Manage Activity"** page, select the "Financials" tab, followed by selecting **<Edit>** next to "Funding Sources".



3 The **"Edit Funding Source"** page will load. Enter the amount for each desired funding source. If the funding source is not match funding, select **<No>**. When complete, select **<Save>.**



The remainder of this page intentionally left blank.

D3. Grantee | Activity Responsible Organization Budgets

User Role: Grantee Users	**Menu Option:** Search Activities

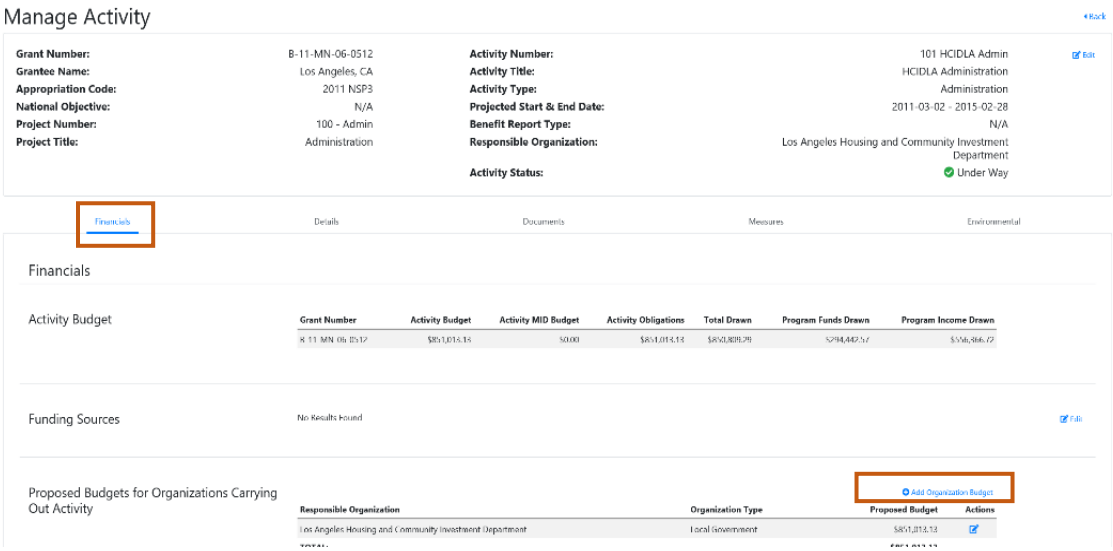
Purpose: Allow Grantee Users to manage the Activity's Responsible Organization budgets.

Complete the following steps to manage the Activity's Responsible Organization budgets:

1 Follow the steps in Section C2 above to search for an activity.

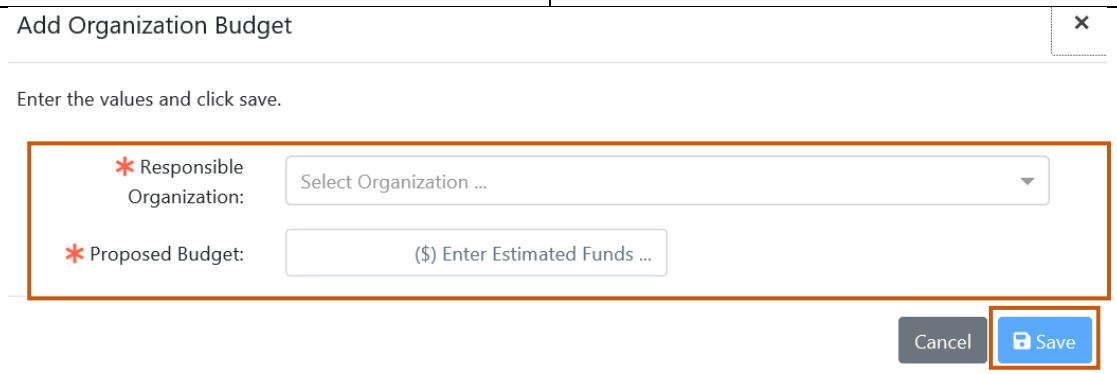
2 On the **"Manage Activity"** page, select the "Financials" tab, followed by selecting **<Add Organization Budget>** next to "Proposed Budgets for Organizations Carrying Out Activity."

Note: the responsible organization defaults to name of the Grantee, for Activities associated with a technical assistance provider. Edits are allowed.

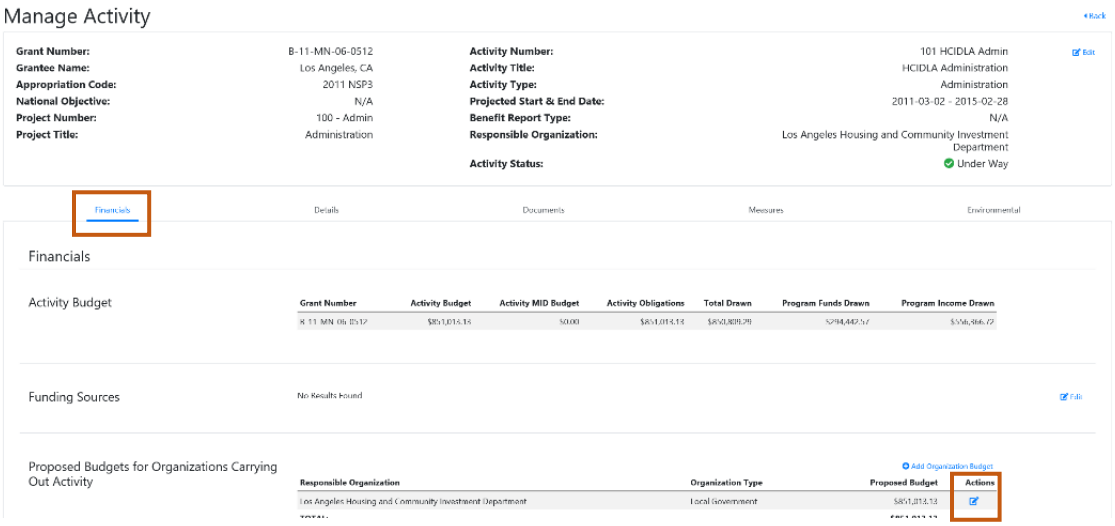


3 The **"Add Organization Budget"** page will load. Select the desired organization from the "Responsible Organization" dropdown menu. Enter the budget in the "Proposed Budget" field. Select the **<Save>** button when complete. See Chapter 6 – Responsible Organizations for more information.

User Role: Grantee Users	Menu Option: Search Activities

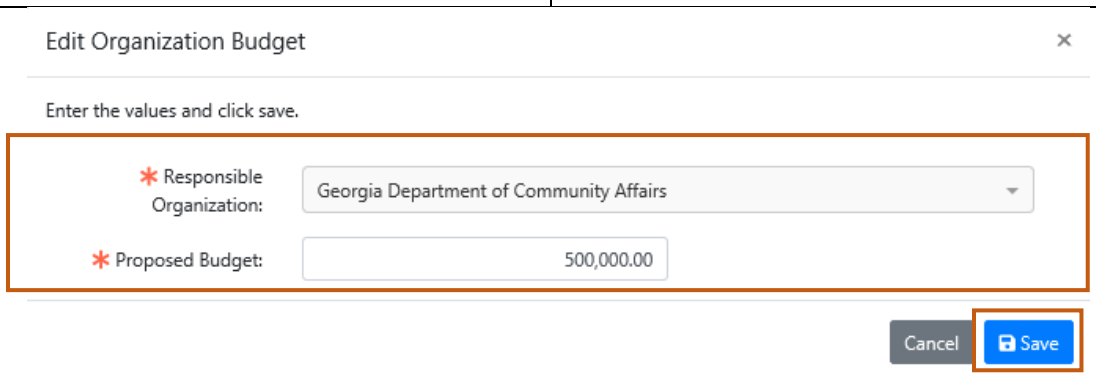


4 To **Edit an existing Activity Responsible Organization Budget**: From the **"Manage Activity"** page, select the "Financials" tab, followed by selecting **<Edit>** under the "Action" column for the Responsible Organization Budget you wish to edit.



5 The **"Edit Organization Budget"** page will load. Select the desired organization from the "Responsible Organization" dropdown menu to change the existing Responsible Organization. Enter the revised budget in the "Proposed Budget" field. Select the **<Save>** button when complete.

User Role: Grantee Users	**Menu Option:** Search Activities



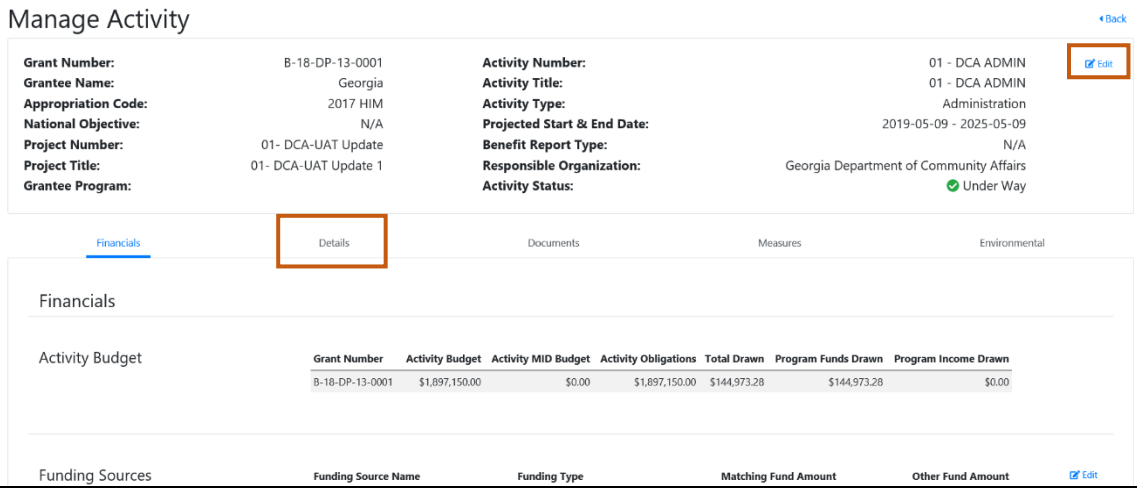
E. Manage Activity: Details

This Section provides procedures for navigating the "Details" Tab of the **"Manage Activity"** page. In this Section, the edit functions are not applicable to DRGR users associated with a technical assistance provider.

User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to access the **"Manage Activity - Details"** page.	

Complete the following steps to acess the "Manage Activity - Details" page:

1. Follow the steps in Section C2 to search for an activity.
2. On the **"Manage Activity"** page, select the "Details" Tab to edit Activity details. The Activity Narrative can be edited by selecting **<Edit>** next to the "Manage Activity" Title Bar.



E1. Grantee | Activity Description

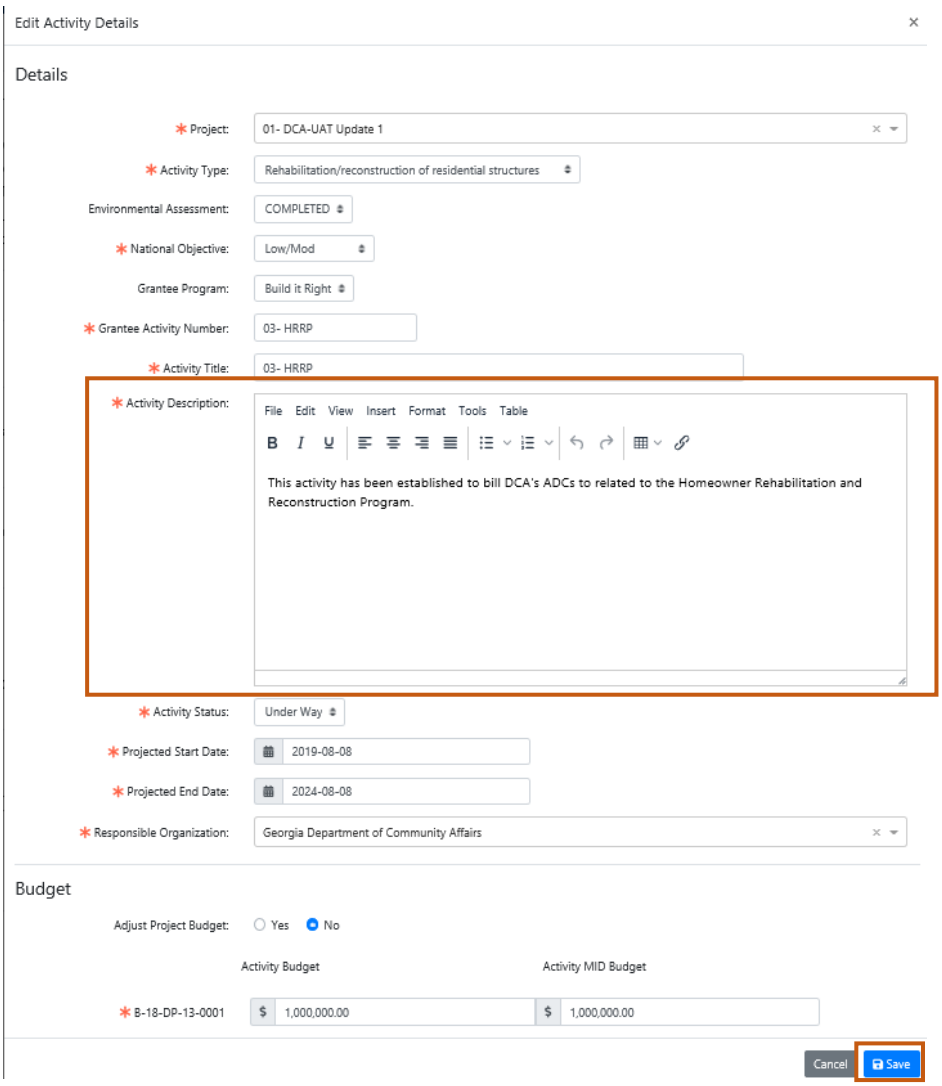
User Role: Grantee Users	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to manage an Activity's description.

Complete the following steps to manage an Activity's description:

1 Follow the steps in Section C2 to search for an activity.

2 On the **"Manage Activity"** page select **<Edit>** next to the "Manage Activity" Title Bar. The **"Edit Activity Details"** page will load. Scroll down to the "Activity Description" section and add or edit the text. Select **<Save>** when complete.



E2. Grantee | Activity Location

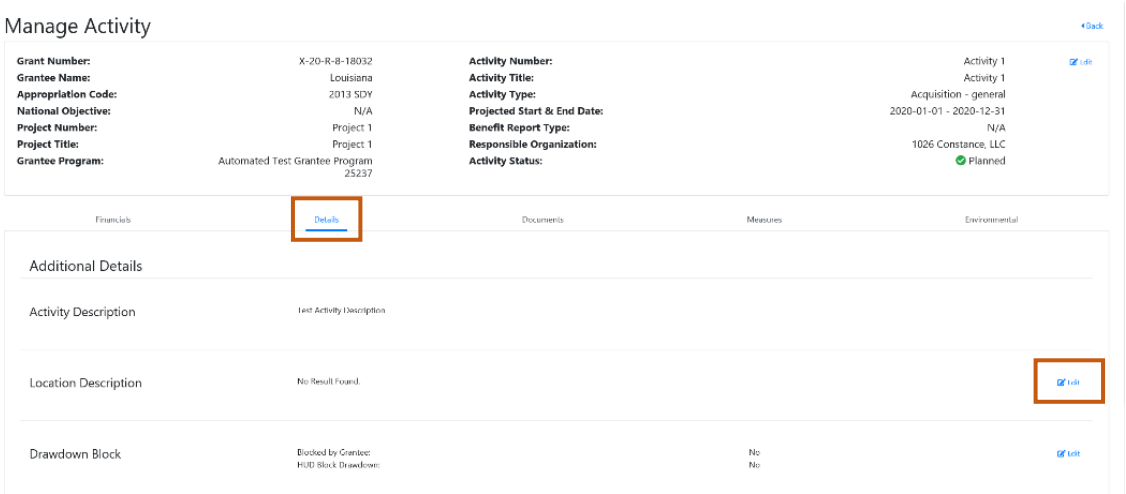
User Role: Grantee Users (excluding TA Provider users)	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to manage an Activity's location description.

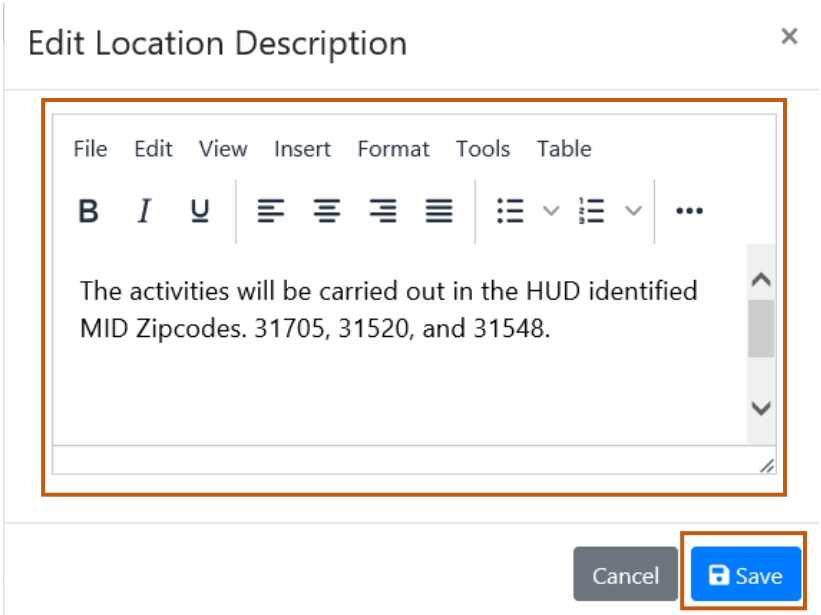
Complete the following steps to manage an Activity's location description:

1 Follow the steps in Section C2 to search for an activity.

2 On the **"Manage Activity"** page, select the "Details" tab, followed by selecting **<Edit>** next to "Location Description".



3 The **"Edit Location Description"** page will load. Enter the location description in the dialogue box. When complete, select the **<Save>** button.



User Role: Grantee Users (excluding TA Provider users)	Menu Option: Search Activities

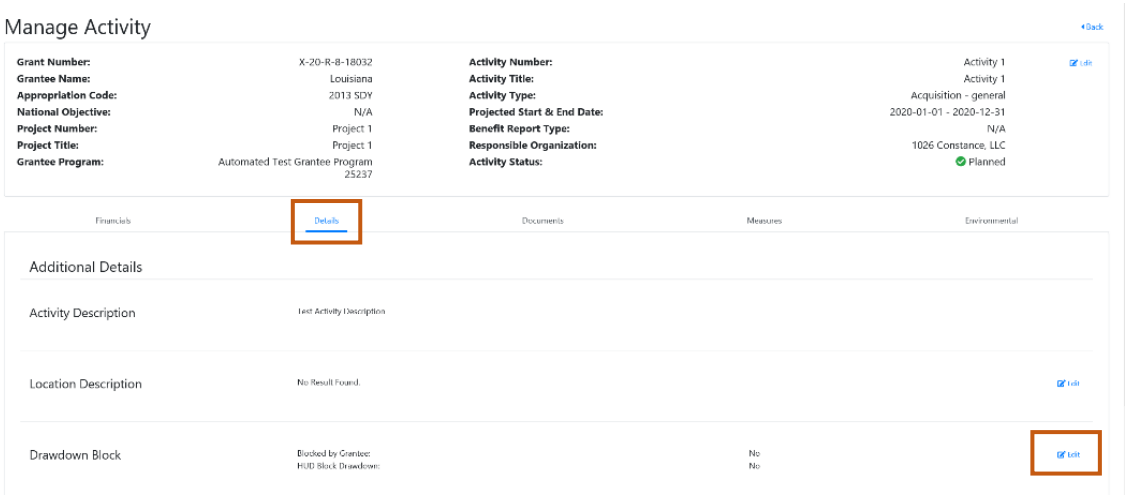
E3. Grantee | Activity Drawdown Blocks

User Role: Grantee Administrators	**Menu Option:** Search Activities
Purpose: Allow Grantee Administrators to block and unblock drawdowns for an Activity.	

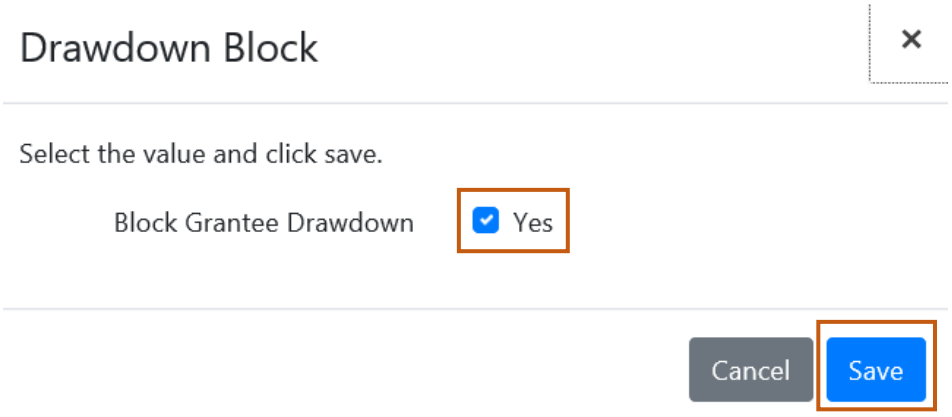
Complete the following steps to block and unblock drawdowns for an Activity:

1 Follow the steps in Section C2 to search for an activity.

2 On the **"Manage Activity"** page, select the "Details" tab, followed by selecting **<Edit>** next to "Drawdown Block."



3 The **"Drawdown block"** page will load. Select **<Yes>** to block all drawdowns for this activity or unselect **<Yes>** to remove the drawdown block. When complete, select **<Save>**.



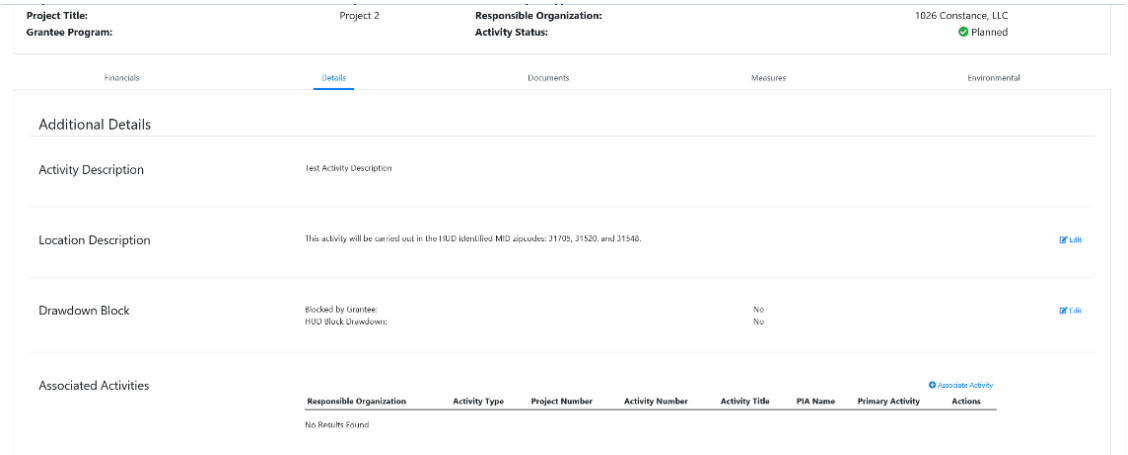
E4. Grantee | Associate Activities

User Role: Grantee Users (excluding TA Provider users)	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to manage Activity associations.	

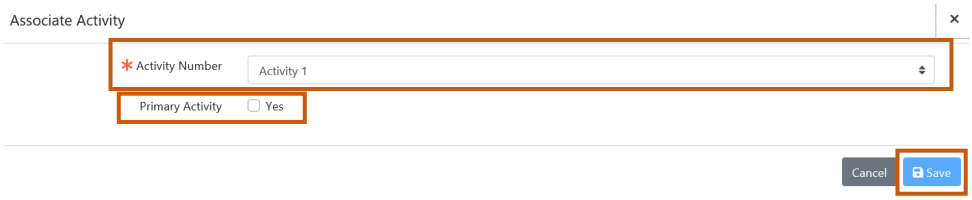
Complete the following steps to manage Activity associations:

1 Follow the steps in Section C2 to search for an activity.

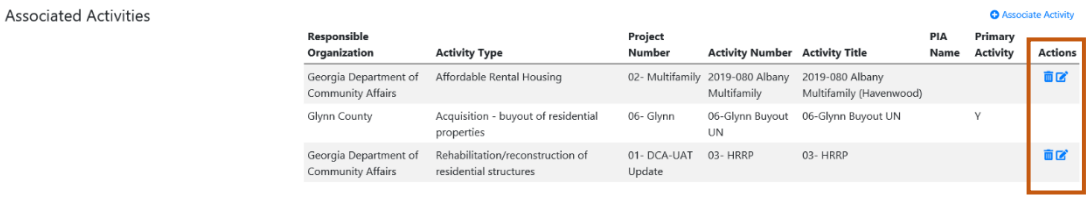
2 On the **"Manage Activity"** page, select the "Details" tab, followed by selecting **<Associate Activity>** located next to "Associated Activities."



3 The **"Associate Activity"** page will load. Select the desired activity to associate from the "Activity Number" dropdown menu. Select **<Yes>** for "Primary Activity" if the selected activity is the main activity in the association. Do not select **<Yes>** for "Primary Activity" if the selected activity is a secondary activity to the main/primary activity. When complete, select **<Save>**. Repeat steps 1 and 2 to associate another Activity, if applicable.

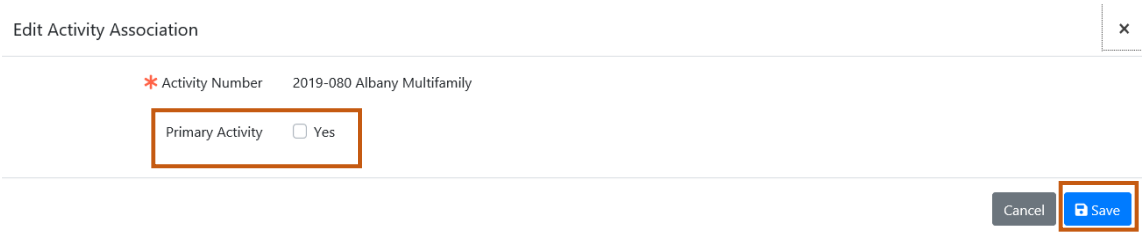


4 To edit which associated activity is "Primary," from the **"Manage Activity"** page, select the "Details" tab, followed by selecting **<Edit>** next the desired activity.



User Role: Grantee Users (excluding TA Provider users)	**Menu Option:** Search Activities

5 The **"Edit Activity Association"** page will load. Select **<Yes>** for "Primary Activity" if the selected activity is the main activity in the association. Unselect **<Yes>** for "Primary Activity" if the selected activity is a secondary activity to the primary activity. When complete, select the **<Save>** button.



6 To **delete an existing Activity Association**, from the **"Manage Activity"** page, select the "Details" tab, followed by selecting **<Delete>** next the desired activity. The page will refresh and the activity will no longer be displayed.

F. Manage Activity: Documents

This Section provides procedures for navigating the "Documents" tab of the **"Manage Activity"** page.

User Role: Grantee Users	**Menu Option:** Search Activities

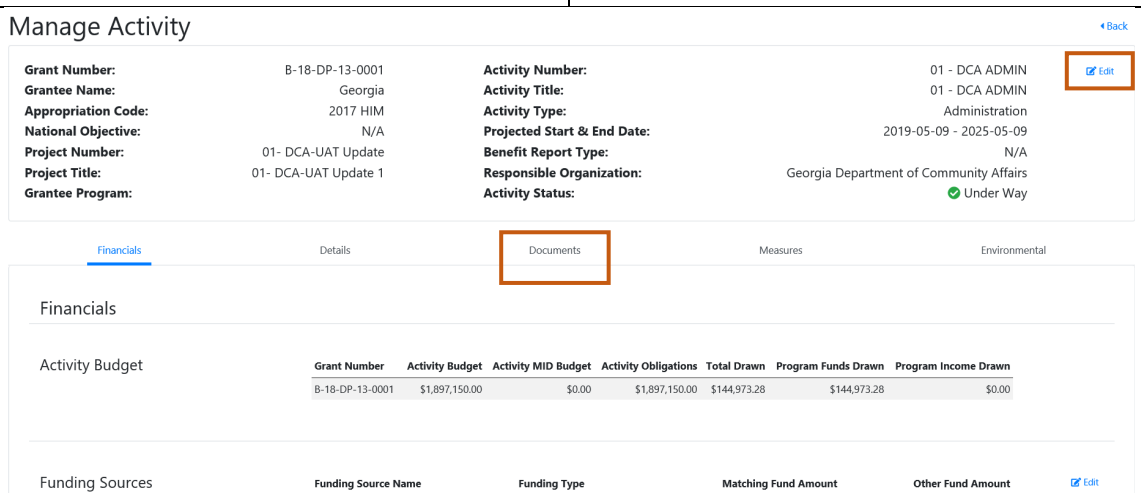
Purpose: Allow Grantee Users to access the **"Manage Activity - Documents"** page.

✔ Complete the following steps to acess the "Manage Activity - Documents" page:

1 Follow the steps in Section C2 to search for an activity.

2 **On** the **"Manage Activity"** page, select the "Documents" Tab to add/edit supporting documents.

User Role: Grantee Users	**Menu Option:** Search Activities



F1. Grantee | Activity Supporting Documents

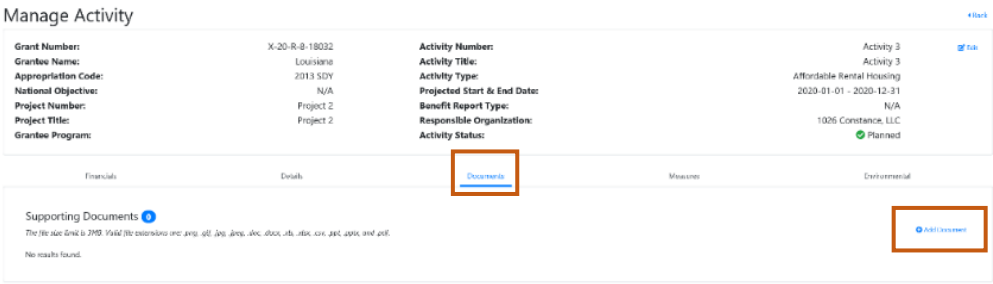
User Role: Grantee Users	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to manage Activity supporting documents.

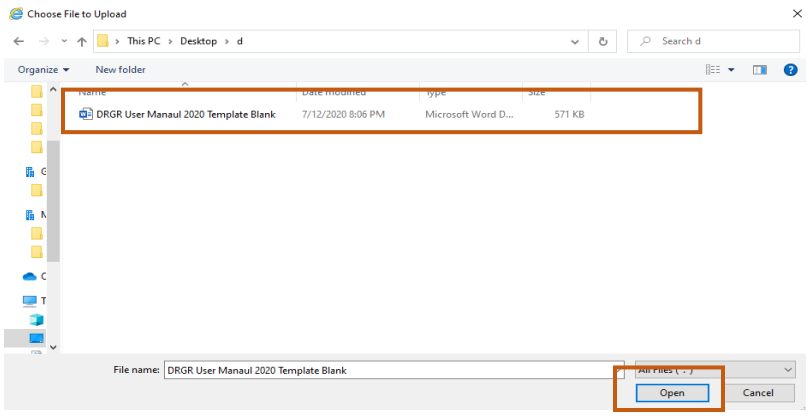
Complete the following steps to manage Activity supporting documents:

1 Follow the steps in Section C2 to search for an activity.

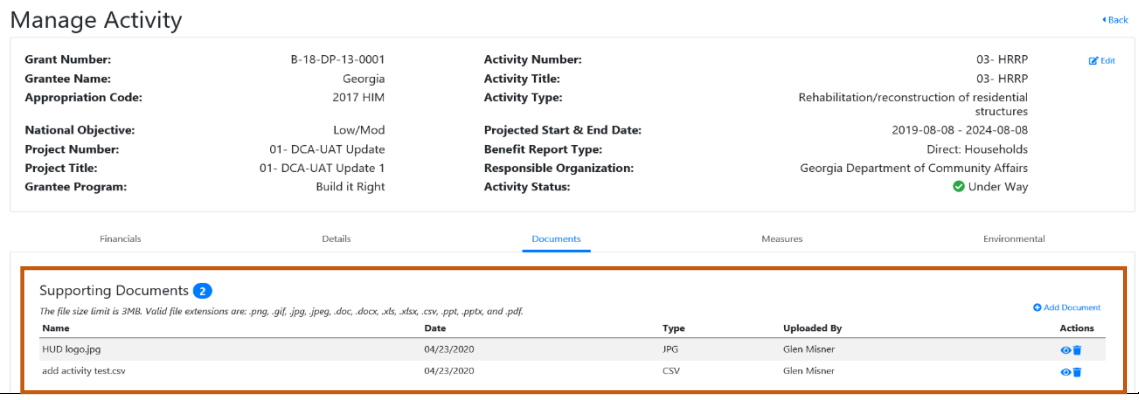
2 From the **"Manage Activity"** page, select the "Documents" tab followed by **<Add Document>.**



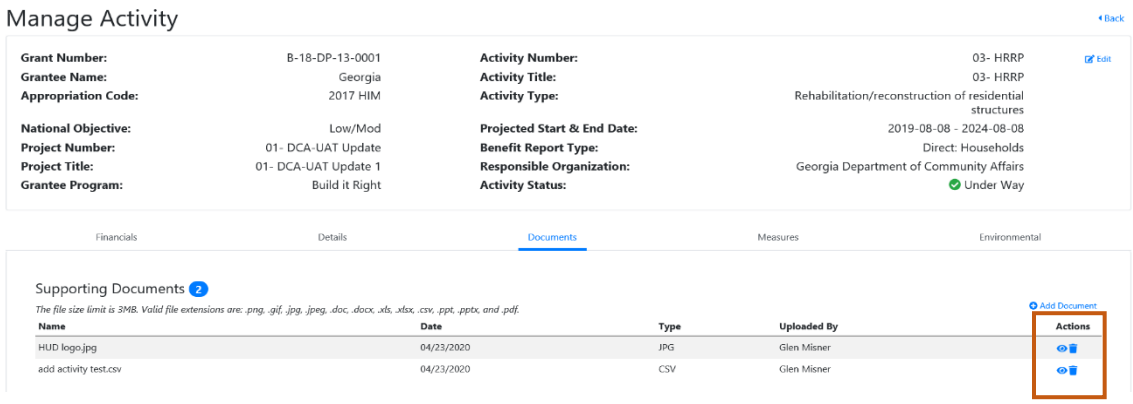
3 A file upload page will load. Select the desired document to upload and select **<Open>**.



4 Upon successful upload, the document will appear in the "Supporting Documents" table.



5 To delete a document, select **<Delete>** for the desired document in the "Actions" column.



G. Manage Activity: Measures

This Section provides procedures for navigating the "Measures" tab of the **"Manage Activity"** page. The measures available to select depend on the Grant appropriation and an Activity's "Activity Type." Users complete three possible measures types, as applicable to the appropriation and Activity Tylpe.

Summary of Activity Measures

Performance Measures	Measure Values	Subsection
Benefit Reporting	**Direct Benefit.** Used to identify the beneficiaries of the Activity to demonstrate meeting the Low/Mod Households (LMH), Low/Mod Clientele (LMC), or Low/Mod Jobs (LMJ) National Objective. For housing activities, housing tenure (renter or owner) and housing unit type (single family or multifamily) must also be selected.	G1
	Area Benefit – Census. Used to identify the Low/Mod percentage of the Activity service area to demonstrate meeting the Low/Mod Area (LMA) National Objective.	G2
	Area Benefit – Survey. Used to identify the Low/Mod percentage of the Activity service area to demonstrate meeting the Low/Mod Area (LMA) National Objective.	G3
Proposed Accomplishments	The System provides multiple accomplishments (e.g. "Number of Housing Units," "Number of Public Facility Improvements," "Number of organizations served," "Number of jobs created," etc.) to select from based on the Activity Type.	G4
Proposed Beneficiaries	**Number of Persons**. Used to demonstrate meeting the Low/Mod Clientele (LMC) National Objective.	G5
	Number of Jobs Created/Retained. Used to demonstrate meeting the Low/Mod Jobs (LMJ) National Objective.	
	Number of Households. Used to demonstrate meeting the Low/Mod Households (LMH National Objective.)	

Failure to select and propose accomplishments in the Activity "Measures" Tab will prevent Grantees from being able to report those accomplishments in the performance report (see Chapter 19). Additionally, entering even a zero for an accomplishment will result in that measure appearing in the Performance Report for completion.

G1. Grantee | Activity Benefitting Reporting Performance – Direct Benefit

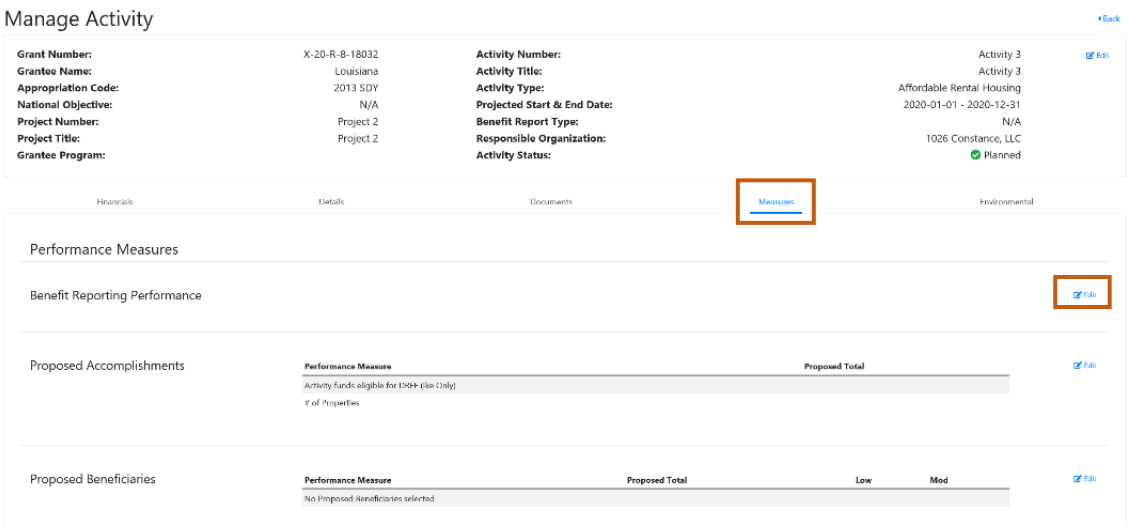
This Section provides general guidance on navigating the Measures functions. The Measures applicable to a Grant will depend on the appropriation and the chosen Activity Type. This section provides an example of completion of Measures for a Direct Benefit activity such as those that may be included in CDBG-DR, NSP, or RIF program delivery, however, the basic steps for navigating to the Measures functions in the Activity are useful for most users.

User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to select the Direct Benefit Reporting Performance.	

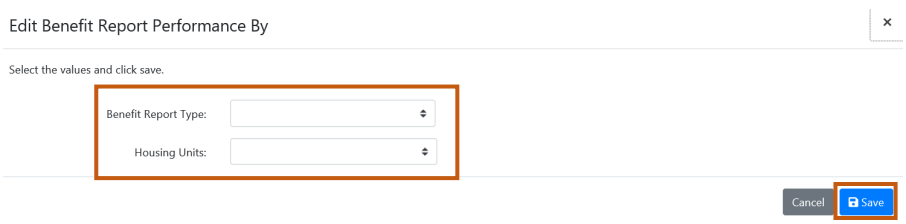
Complete the following steps to select the Direct Benefit Reporting Performance:

1 Follow the steps in Section C2 to search for an activity.

2 From the **"Manage Activity"** page, select the "Measures" tab followed by **<Edit>** located next to "Benefit Reporting Performance."



3 The **"Edit Benefit Report Performance By"** page will load. The "Benefit Report Type" and "Housing Units" (housing activities only) dropdown menus contain values related to the "Activity Type" selected. Select the desired value for each field, followed by **<Save>**.



G2. Grantee | Activity Benefitting Reporting Performance – Area Benefit (Census)

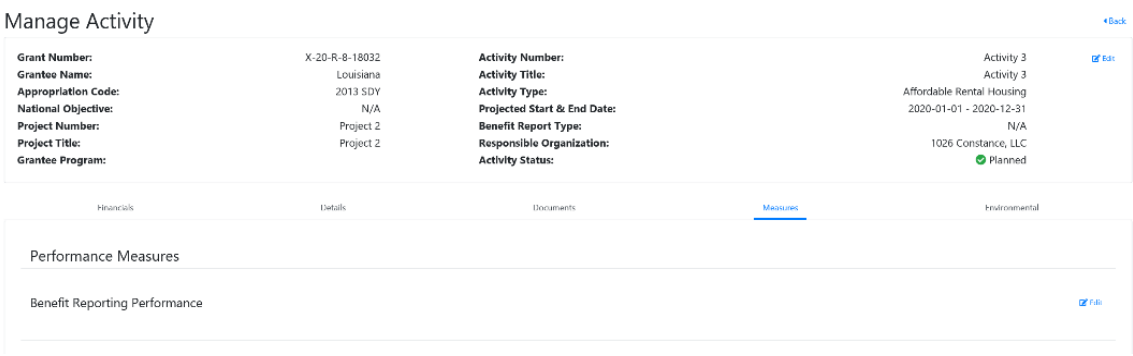
This Section provides general guidance on navigating the Measures functions. The Measures applicable to a Grant will depend on the appropriation and the chosen Activity Type. This section provides an example of completion of Measures for an Area Benefit activity using the census method such as those that may be included in CDBG-DR, NSP, or RIF program delivery, however, the basic steps for navigating to the Measures functions in the Activity are useful for most users.

User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to select the Area Benefit (Census) Reporting Performance.	

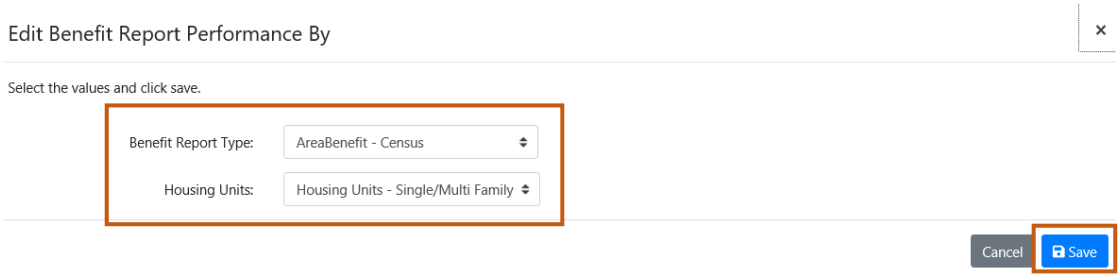
Complete the following steps to select the Area Benefit (Census) Reporting Performance:

1. Follow the steps in Section C2 above to search for an activity.

2. From the **"Manage Activity"** page, select the "Measures" tab followed by **<Edit>** located next to "Benefit Reporting Performance."

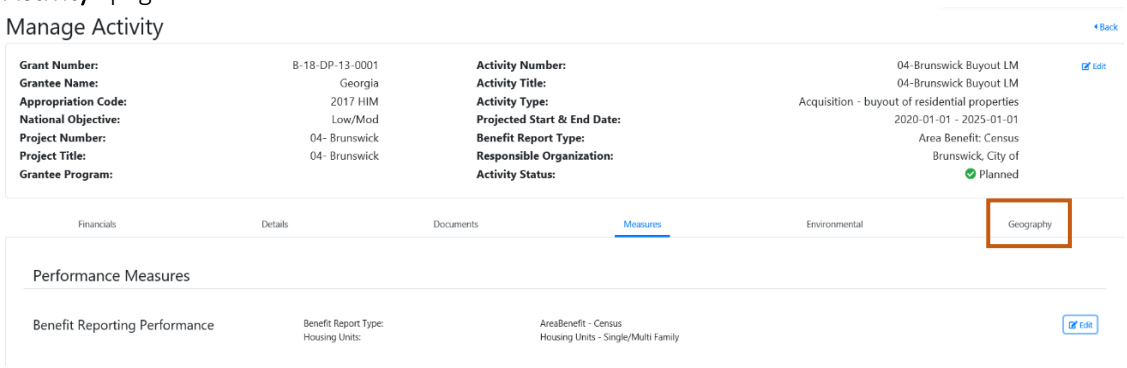


3. The **"Edit Benefit Report Performance By"** page will load. The "Benefit Report Type" and "Housing Units" (housing activities only) dropdown menus contain values related to the "Activity Type" selected. Select "Area Benefit – Census", followed by **<Save>**.

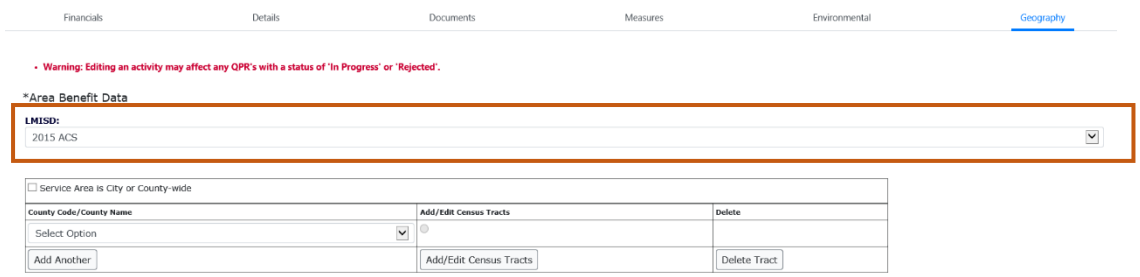


User Role: Grantee Users	**Menu Option:** Search Activities

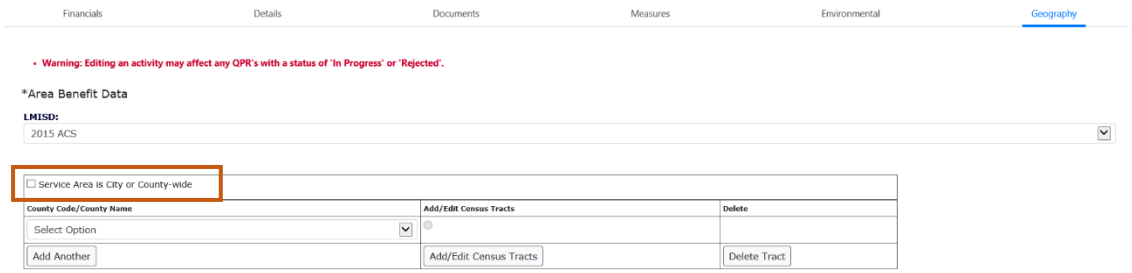
4 After selecting "Area Benefirt – Census", a new "Geography" tab will appear on the **"Manage Activity"** page.



5 Select the "Georgrapy" tab, then select the desired and applicable "LMISD" dataset from the dropdown menu.

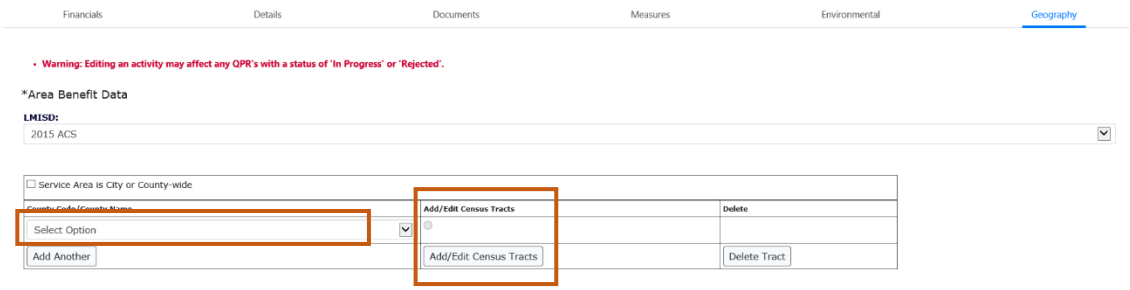


6 If the Activity's "Service Area is City or County-wide,"select the box. In most instances, this is not the case. If the Activity's Service Area is <u>not</u> City or County-wide, unselect the box.

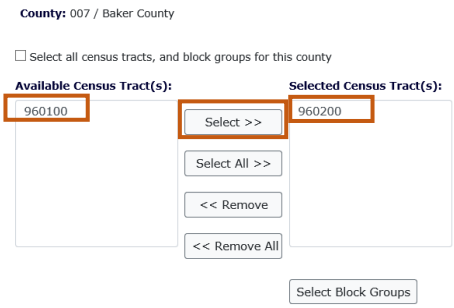


7 To add Census Tracts and Block Groups, select the "County Code / County Name" followed by selecting the **<Add/Edit Census Tracts>** radio button <u>and</u> **<Add/Edit Census Tracts>** button.

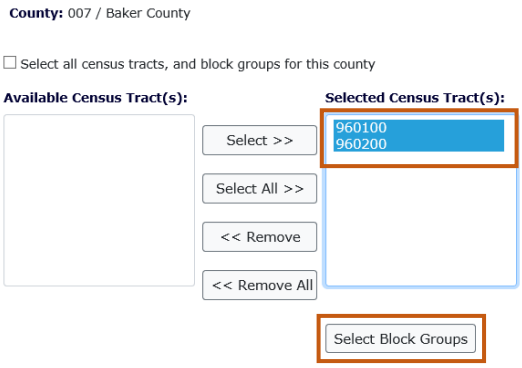
User Role: Grantee Users	Menu Option: Search Activities



8 Select the desired Census Tracts from the "Available Census Tract(s)" box followed by selecting <**Select**> to move the Census Tracts into the "Selected Cenus Tract(s)" box.

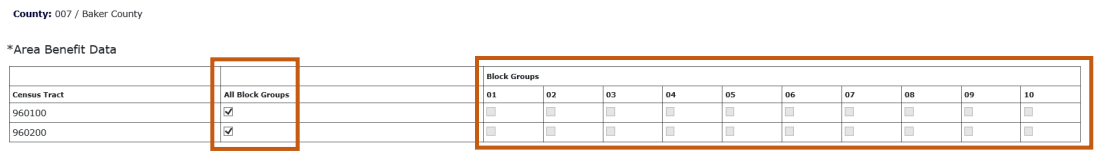


9 Select one or more Census Tracts in "Selected Cenus Tract(s)" box then select **<Select Block Groups>** to choose specific block groups within the selected census tracts.

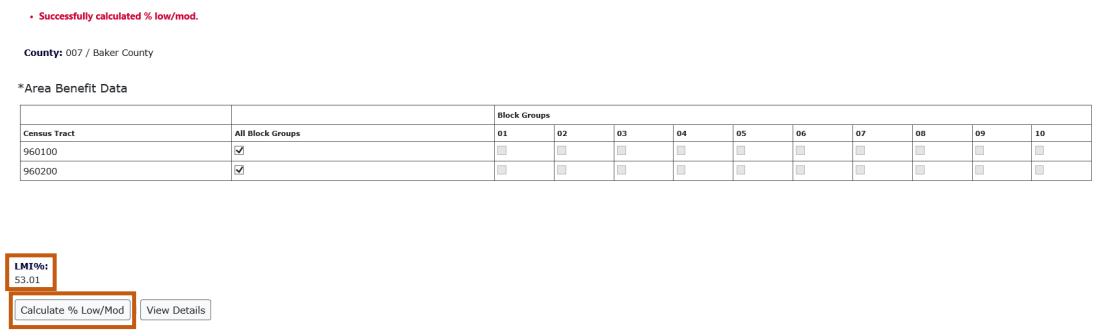


10 Either select **<All Block Groups>** to select every Block Group in the Census Tract, or unselect the box to select the desired block Groups.

User Role: Grantee Users	Menu Option: Search Activities



11 Select **<Calculate % Low/Mod>** to obtain the Low/Mod percentage. Once the percentage is displayed, select **<Save Activity>.**



G3. Grantee | Activity Benefitting Reporting Performance – Area Benefit (Survey)

This Section provides general guidance on navigating the Measures functions. The Measures applicable to a Grant will depend on the appropriation and the chosen Activity Type. This section provides an example of completion of Measures for an Area Benefit activity using the survey method such as those that may be included in CDBG-DR, NSP, or RIF program delivery, however, the basic steps for navigating to the Measures functions in the Activity are useful for most users.

User Role: Grantee Users	Menu Option: Search Activities

Purpose: Allow Grantee Users to select the Area Benefit - Survey Reporting Performance.

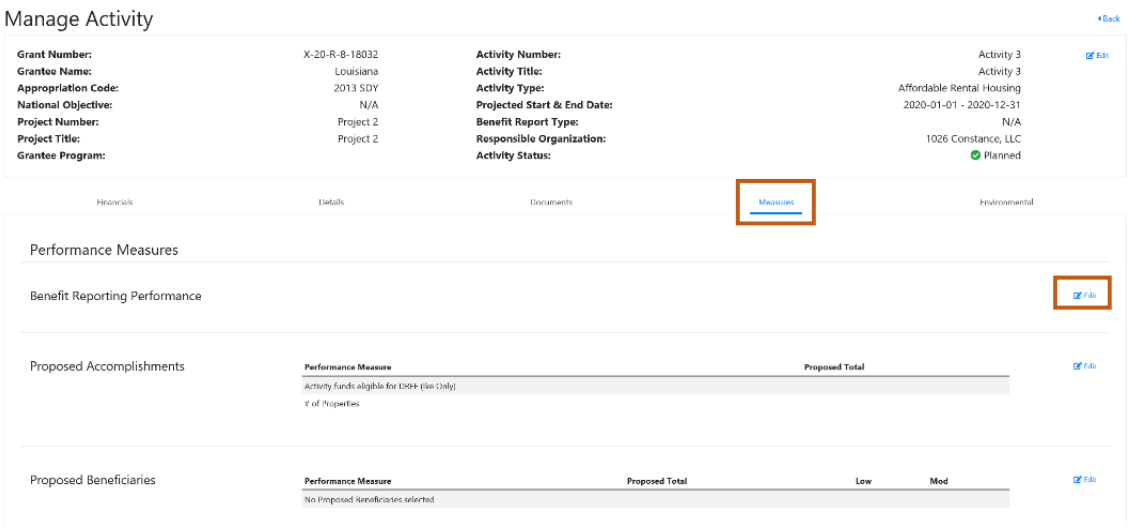
Complete the following steps to select the Area Benefit – Survey Benefit Reporting Performance:

1 Follow the steps in Section C2 to search for an activity.

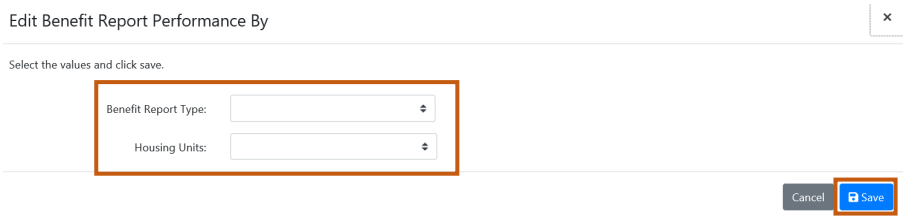
The remainder of this page intentionally left blank.

User Role: Grantee Users	**Menu Option:**

2 From the **"Manage Activity"** page, select the "Measures" tab followed by **<Edit>** located next to "Benefit Reporting Performance".



3 The **"Edit Benefit Report Performance By"** page will load. The "Benefit Report Type" and "Housing Units" (housing activities only) dropdown menus contain values related to the "Activity Type" selected. Select **<Area Benefit – Survey>**, followed by **<Save>**.



4 Unlike "Area Benefit – Census," Grantees are not required to select Census Tracts and Block Groups for the service area. The number of Low/Mod persons obtained from the Survey are entered in "Proposed Beneficiaries" (see subsection G5).

The remainder of this page intentionally left blank.

G4. Grantee | Proposed Accomplishments

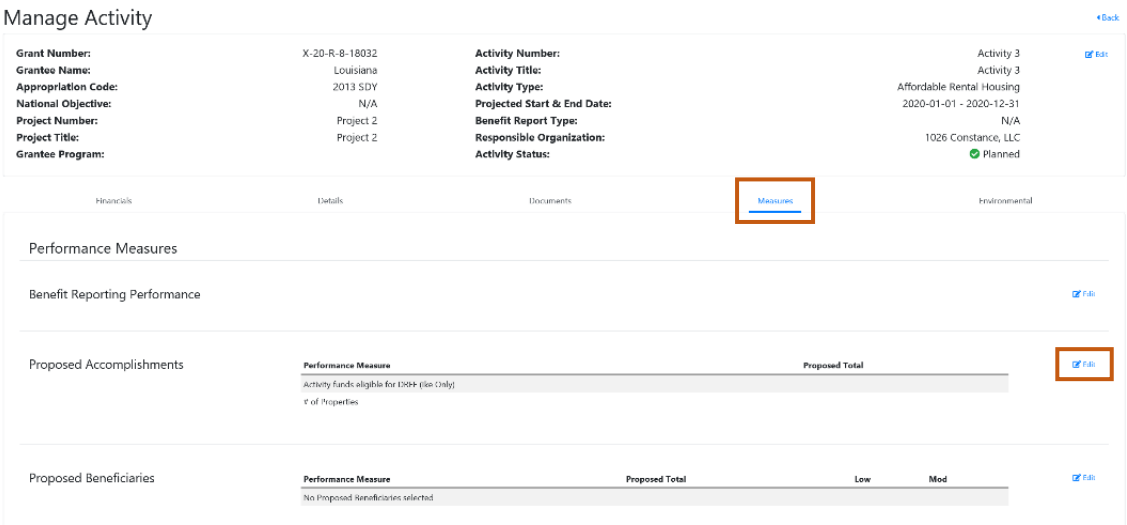
User Role: Grantee Users	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to select Proposed Accomplishments for the Activity.

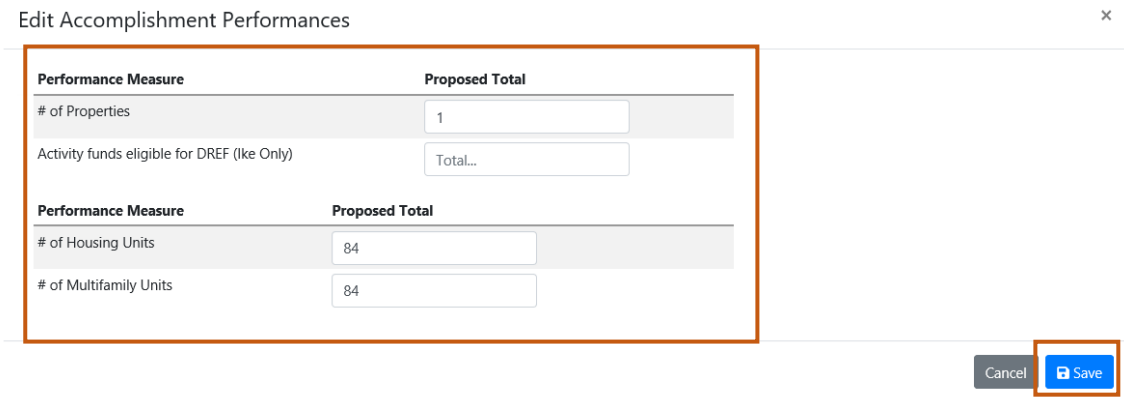
Complete the following steps to select Proposed Accomplishments:

1 Follow the steps in Section C2 to search for an activity.

2 From the **"Manage Activity"** page, select the "Measures" tab followed by **<Edit>** located next to "Proposed Accomplishments".



3 The **"Edit Accomplishment Performances"** page will load. The pre-populated "Performance Measures" are related to the "Activity Type" selected. Enter the proposed total for each performance measure where appropriate. When complete, select **<Save>**.



G5. Grantee | Proposed Beneficiaries

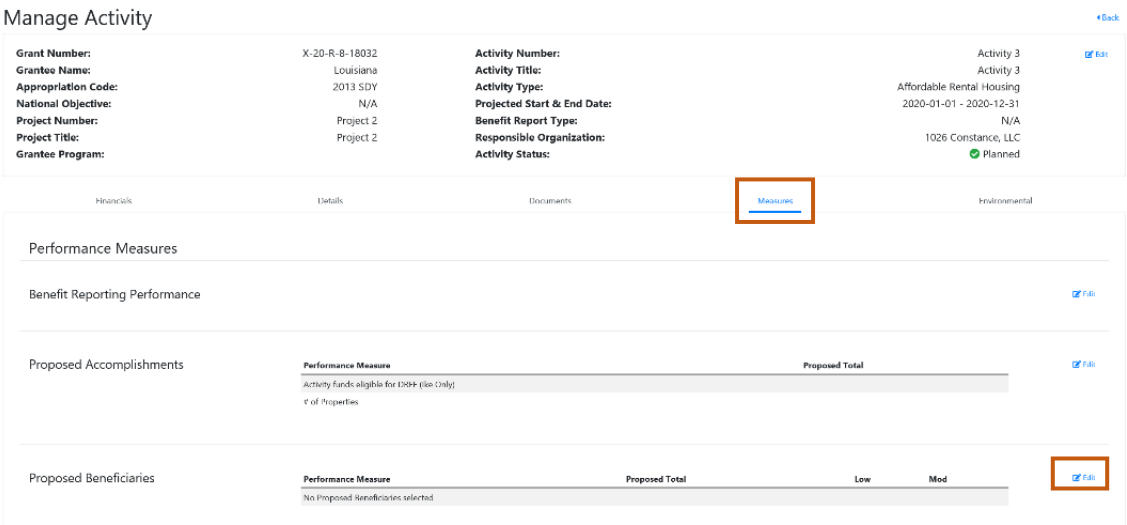
User Role: Grantee Users	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to select Proposed Beneficiaries for the Activity.

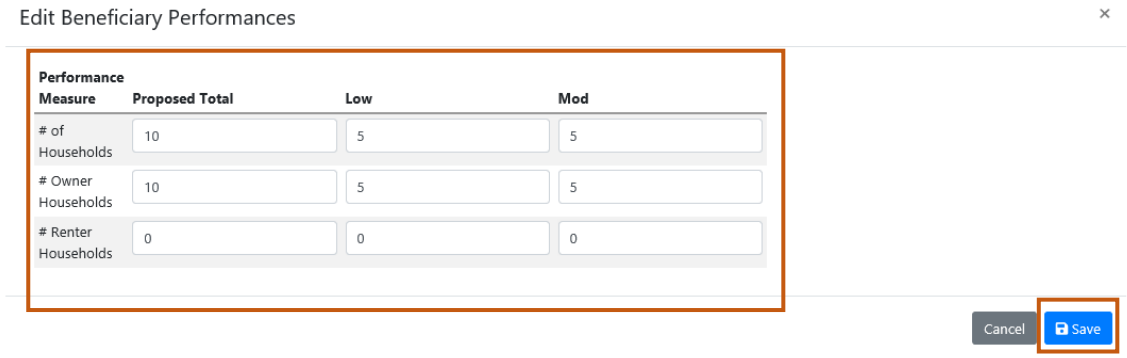
Complete the following steps to select Proposed Beneficiaries:

1 Follow the steps in Section C2 to search for an activity.

2 From the **"Manage Activity"** page, select the "Measures" tab followed by **<Edit>** located next to "Proposed Beneficiaries."



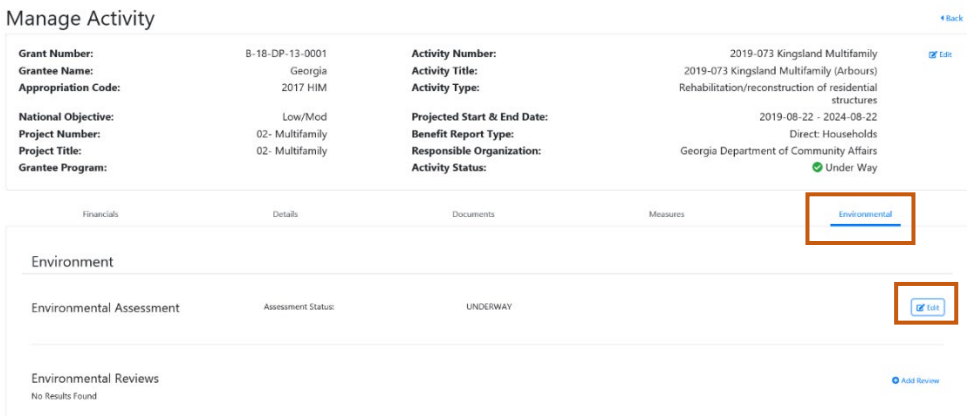
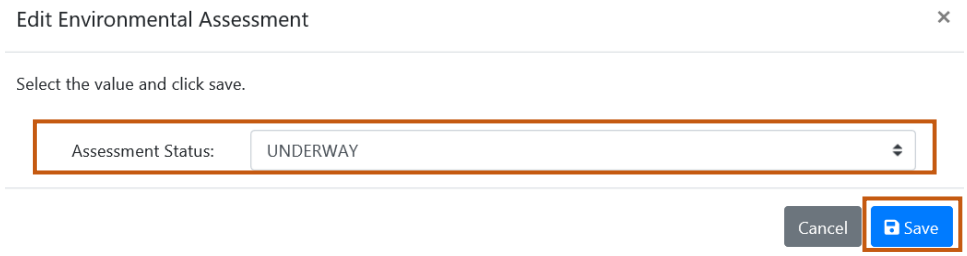
3 The **"Edit Beneficiary Performances"** page will load. Enter the proposed total, including totals for Low and Mod, for each performance measure where appropriate. When complete, select **<Save>.**



H. Manage Activity | Environmental

This Section provides procedures for navigating the "Environmental" tab of the **"Manage Activity"** page. This section is not applicable for RCB, Section 4, and DRGR users associated with a technical assistance provider.

H1. Grantee | Environmental Assessment

User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to manage Activity Environmental Assessment records.	
Complete the following steps to manage Activity Environmental Assessment records:	
1 Follow the steps in Section C2 to search for an activity.	
2 From the **"Manage Activity"** page, select the "Environmental" tab followed by **<Edit>** located next to "Environmental Assessment." 	
3 The **"Edit Environmental Assessment"** page will load. Select "Exempt", "Completed", or "Underway" from the dropdown menu. When complete, select **<Save>**. 	

H2. Grantee | Environmental Reviews

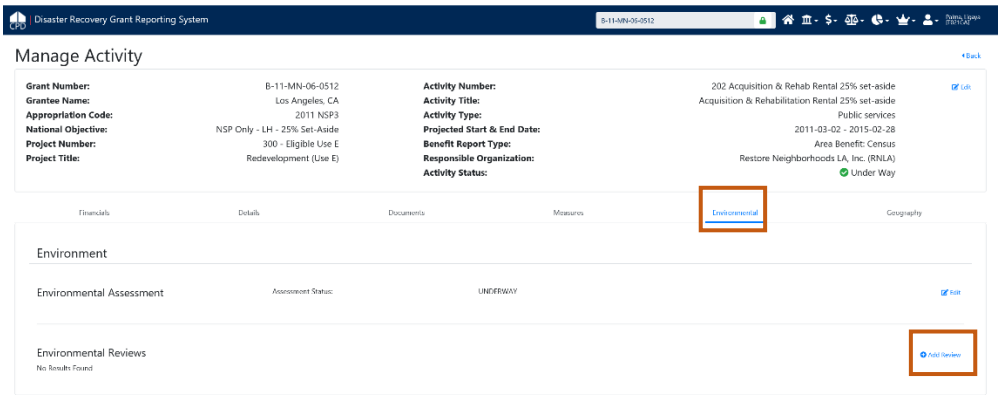
User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Search Activities

Purpose: Allow Grantee Users to manage Activity Environmental Review records.

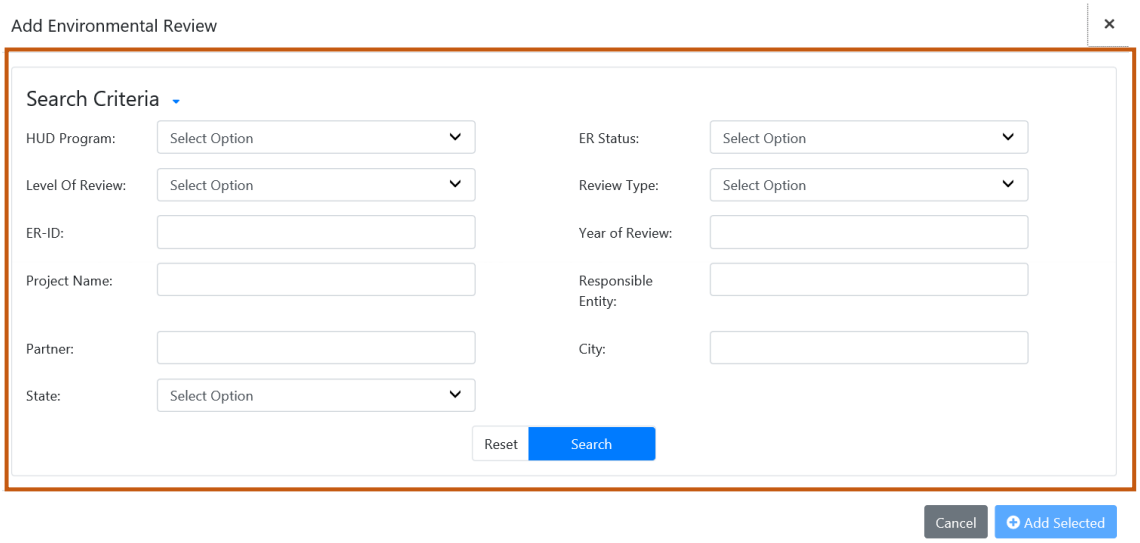
Complete the following steps to manage Activity Environmental Review records:

1 Follow the steps in Section C2 to search for an activity.

2 From the **"Manage Activity"** page, select the "Environmental" tab followed by **<Add Review>** located next to "Environmental Reviews."



3 The **"Add Environmental Review"** page will load. Enter search criteria and select **<Search>** to search for the HEROS Environmental Review.



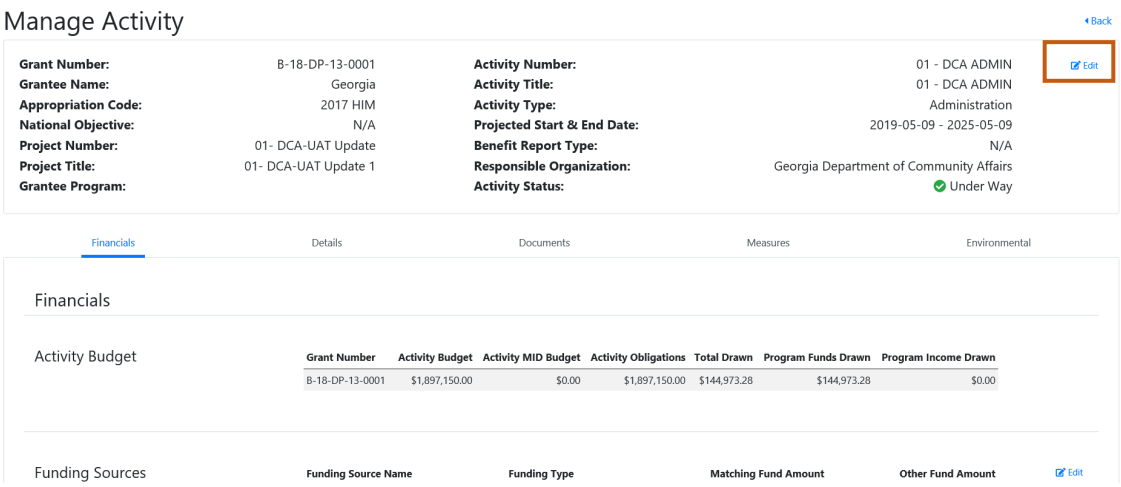
User Role: Grantee Users (excluding TA Provider Users)	**Menu Option:** Search Activities
4 Select the desired Environmental Review from the search results followed by selecting **<Add Selected>**.	

I. Delete and Restore Activities

Grantees have the option of deleting activities that were inadvertently created or are no longer in use. Deleting an activity will result in the activity no longer appearing in the Action Plan, QPRs, and MicroStrategy Reports. Before deleting an activity, all vouchers associated with the activity must be revised to other activities. The activity status must be changed to cancelled and the total drawdown amount must be zero. Note that deleted activities can be restored and edited for proper use. This section is not applicable for DRGR users associated with a technical assistance provider. See Chapter 17 – Technical Assistance Work Plans to delete and restore activities using the work plan functions.

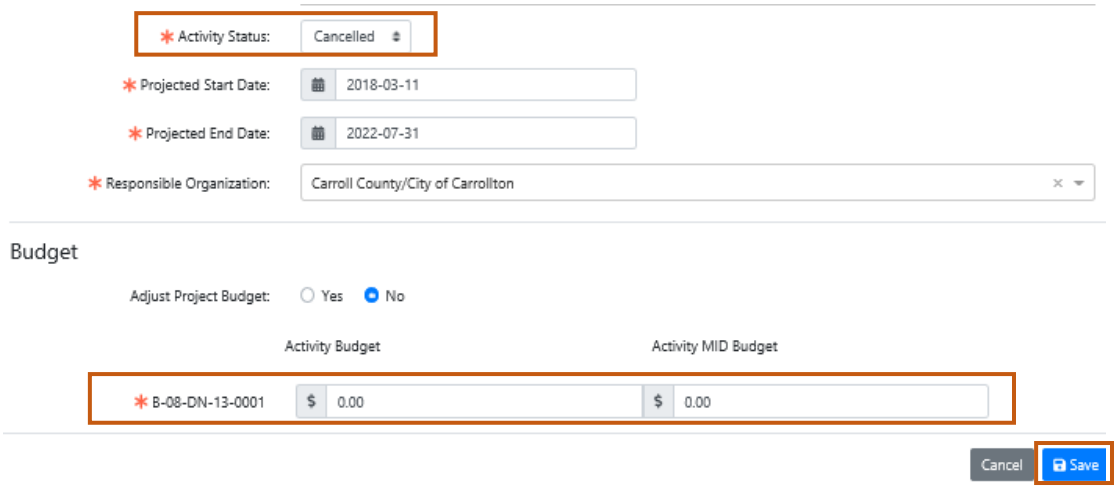
I1. Grantee | Delete Activity

User Role: Grantee Users	**Menu Option:** Search Activities
Purpose: Allow Grantee Users to delete an existing Activity.	
Complete the following steps to delete an existing Activity:	
1 Follow the steps in Section C2 to search for an activity.	
2 On the **"Manage Activity"** page, select the **<Edit>** link on the top right corner of the page.	

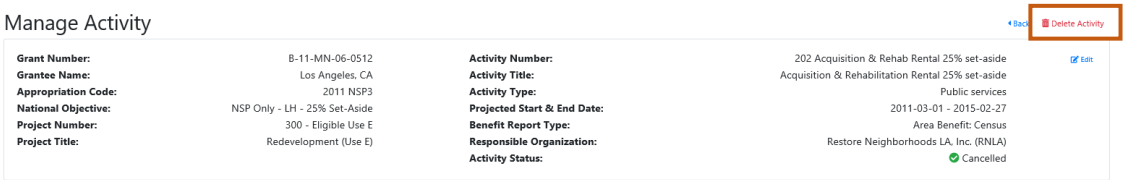


User Role: Grantee Users	**Menu Option:** Search Activities

3 The **"Edit Activity Details"** page will load. Change the "Activity Status" to "Cancelled" and edit the "Activity Budget" to $0.00. When complete, select **<Save>**.



4 The **"Manage Activity"** page will load. Select **<Delete Activity>** on the top right corner of the page. A prompt will load confirming the intent to delete the Activity. Select **<Ok>** to complete the process.



I2. Grantee | Restore Deleted Activity

User Role: Grantee Administrators	**Menu Option:** Restore Activities

Purpose: Allow Grantee Administrators to restore a deleted an existing Activity.

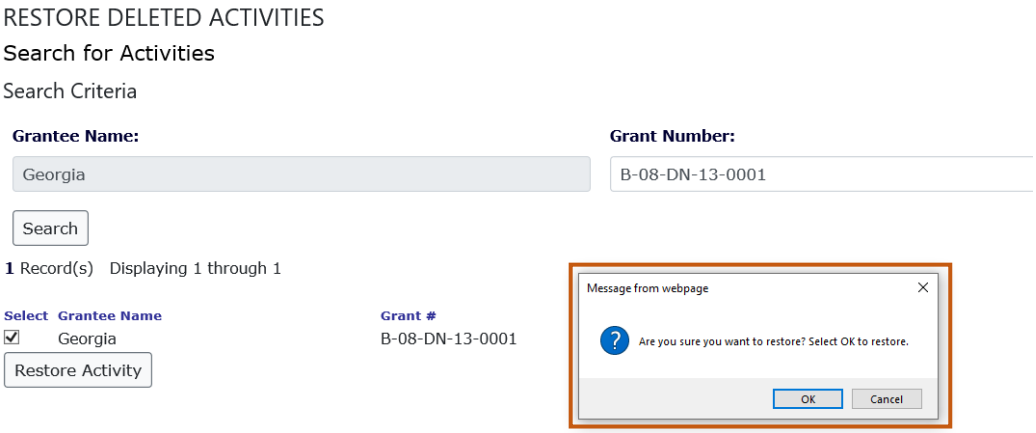
Complete the following steps to restore a deleted an existing Activity:

User Role: Grantee Administrators	**Menu Option:** Restore Activities

1 Navigate to the **Manage My Grant** module, locate the **Activities** menu, and select **<Search Activities>**. The **"Search Activities"** page will load. Enter search criteria and select **<Search>**. Search results will load.

To restore an existing deleted Activity, select the checkbox next to the desired activity and select **<Restore Activity>**.

2 A prompt will load confirming the intent to restore the deleted Activity. Select **<Ok>** to complete the process.



3 The activity will be assigned to the "9999 Restricted Balance Project". Navigate to "Edit Activity Details" to assign the activity to the desired project.

Chapter 15: Action Plan Review Tools | Manage My Grants Module

Chapter 15: Action Plan Review Tools 1

A. Manage My Grants Module Access 3

A1. Grantee | User Access 3

A2. HUD | User Access 3

B. Grantee and HUD Action Plan Review Tools 4

B1. Grantee and HUD | Summary of Action Plan Submission Comments / Review Comments 4

B2. Grantee and HUD | Display Changes from Prior Approved Action Plan 6

B3. Grantee and HUD | Action Plan Review Checklist 8

B4. Grantee and HUD | Review Active Flags 11

C. HUD Alternate Access to Review Tools 12

C1. HUD | Access to Review Tools from the Review Action Plan Page 12

Chapter 15: Action Plan Review Tools

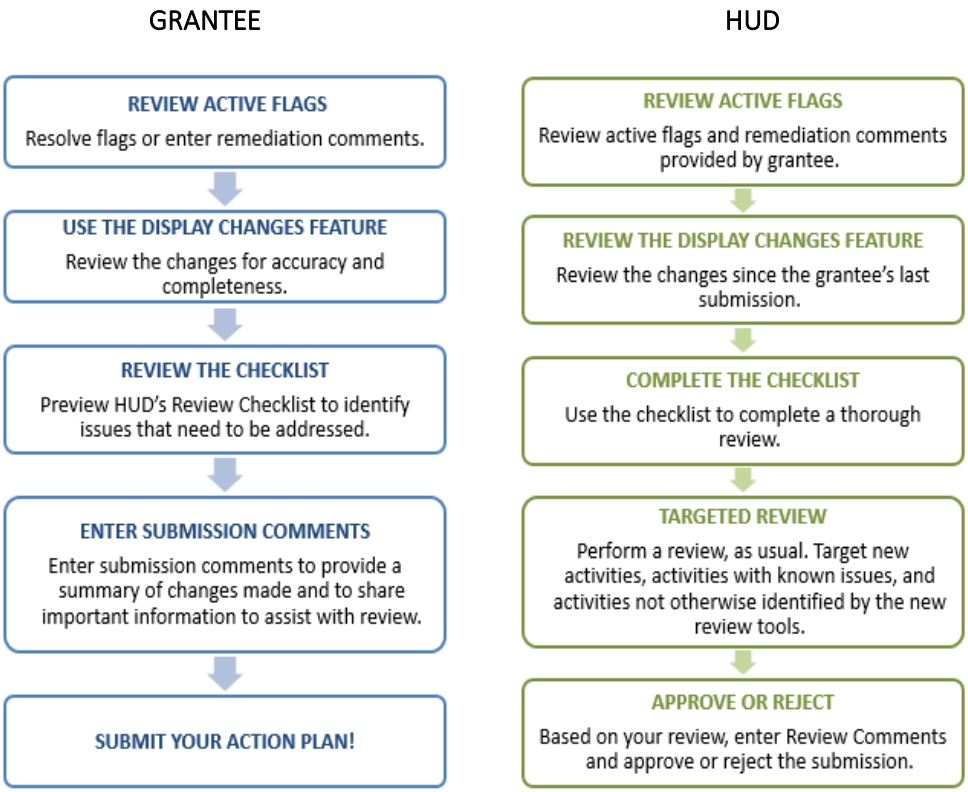
This Chapter provides guidance for accessing and using the Action Plan **"Review Tools"** page under the **Manage My Grants** module. The Action Plan **"Review Tools"** page helps Grantees and HUD Users to conduct Quality Assurance/Quality Control on Action Plans, particularly prior to Action Plan submission. Review Tools are accessible to all Grantee users.

Ideally Grantees will follow a workflow similar to the one below when submitting an Action Plan. This workflow makes active use of the **"Review Tools"** page to help improve Action Plan submission quality and clarity. Grantees will be using the **"Review Tools"** page to:

TIP! Remember that the data displayed on the "Review Tools" page is for the locked Grant.

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Display and review changes being submitted since the previously approved Action Plan
- Access and complete the Action Plan Checklist
- Review summary of Active Flags and helpful flag information

Grantee Action Plan Submission and HUD Review Workflow



After the Action Plan's submission, HUD Reviewers review and either approve or reject the submitted Action Plan. HUD's review will be specific to the Grant appropriation and will focus on the compliance of the Action Plan with Grant requirements and check for accuracy of information. This review will also be a means for the HUD Reviewer to understand how the Grant program is structured.

As part of this review, HUD Reviewers may use both the **"Review Tools"** page and, for some features, the main **"Review Action Plan"** page to access "Review Tools" features. HUD users will see the same functionality on their **"Review Tools"** page as Grantees see on their **"Review Tools"** page.

HUD Reviewers may utilize the following "Review Tools" features:

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Display and review changes being submitted since the previously approved Action Plan
- Access and complete the Action Plan Checklist
- Review summary of "Active Flags" and helpful flag information

Grantee and HUD users do not need Action Plan specific roles to access the Action Plan **"Review Tools"** page. The Action Plan Review Tools functions are summarized below:

Grantee Users

Feature	Subsection	Location
Review Tools	B1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
Review Tools	B2	Display Changes
Review Tools	B3	Review Checklist
Review Tools	B4	Review Active Flags

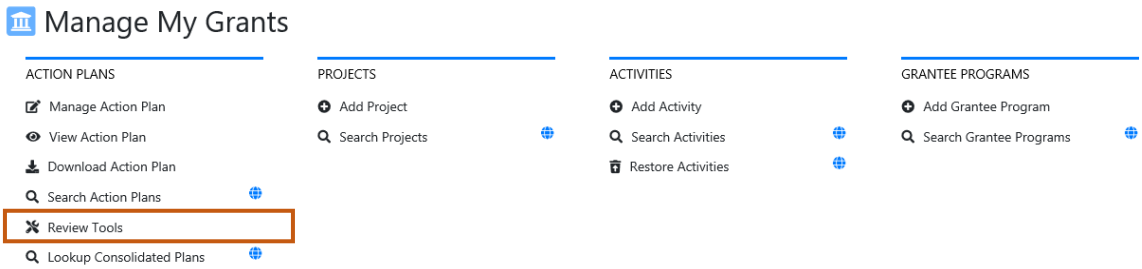
HUD Users

Feature	Subsection	Location
Review Tools Review Action Plan	C1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
Review Tools Review Action Plan	B2/C1	Display Changes
Review Tools Review Action Plan	B3/C1	Review Checklist
Review Tools Review Action Plan	B4/C1	Review Active Flags

A. Manage My Grants Module Access

The **Manage My Grants** module contains all Action Plan Review Tools actions.

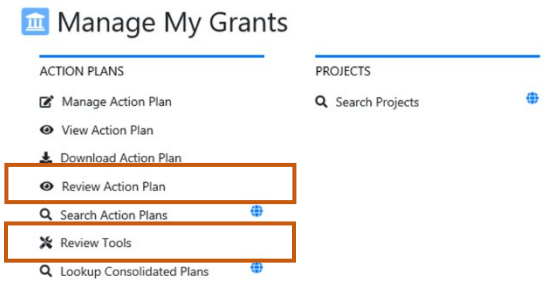
A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Action Plan Review Tools.	
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 System displays the relevant menu items based on user type and user roles. 	

A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Action Plan Review and Review Tools.	
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 System displays the relevant menu items based on user type and user roles.



B. Grantee and HUD Action Plan Review Tools

Below is a summary of the various features of the Action Plan **"Review Tools"** page and how to access them. As noted previously, Grantee and HUD users have access to the same Review Tools. Grantees will use them prior to an Action Plan submission to ensure quality, and HUD CPD Representatives will use them to review the Grantee's Action Plan to facilitate their review and ensure compliance.

B1. Grantee and HUD | Summary of Action Plan Submission Comments / Review Comments

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Users to review previously entered and saved Grantee Action Plan submission comments, HUD Review Comments, and HUD Supporting Documents.	

✓ Complete the following steps to view the submission comments, review comments, and supporting documents:

1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Sections A1 and A2 above. Select the **<Review Tools>** link. The **"Review Tools"** page will load.

The remainder of this page intentionally left blank.

Action Plans

Review Tools

Grant Number:

B-18-DP-13-0001

Grantee Name:

Georgia

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

Display Changes

Display changes from prior approved review

Performance Benchmarks

None

Review Checklist

Review Checklist

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2 As described in Chapter 16 – Action Plan Submission and Approval, Grantees may submit comments to HUD along with their submission of the Action Plan. Any saved Grantee Action Plan submission comments will be displayed on the **"Review Tools"** page. HUD recommends including submission comments with each Action Plan submission, particularly in coordination with a review using the Display Changes feature described below. If the Submission Comments section displays "none," then no Action Plan Submission Comments have been entered and saved since the previous Action Plan submission.

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

3 Similarly, HUD reviewers may provide comments and supporting documents in response to their review and approval or rejection of a Grantee's submitted Action Plan. A summary of HUD's comments and the supporting documents can be accessed from the **<Review Tools>** page.

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

B2. Grantee and HUD | Display Changes from Prior Approved Action Plan

Grantees are encouraged to use the Display Changes feature to review changes made since the previously approved Action Plan. This includes changes to text, performance measure projections, and budgets within the Action Plan's project and activity edit screens. The information can be very useful in helping Grantees summarize the changes made in their Action Plan submission comments, particularly for larger Grantees where more than one person is making changes. Providing accurate and comprehensive Action Plan submission comments generally helps HUD CPD Representatives review Action Plan submissions more quickly. HUD Users will also use the Display Changes feature in their review of the submitted Action Plan.

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Display a record of changes made to the Action Plan through edits since the previous Action Plan approval.	
✓ Complete the following steps to view the Display Changes from Prior Approved Review page:	
1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Sections A1 and A2 above. Select the **<Review Tools>** link. The **"Review Tools"** page will load.	

The remainder of this page intentionally left blank.

Action Plans

Review Tools

Grant Number:

B-18-DP-13-0001

Grantee Name:

Georgia

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

Display Changes

Display changes from prior approved review

Performance Benchmarks

None

Review Checklist

Review Checklist

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2 Select the **<Display changes from prior approved review>** link on the Action Plan "**Review Tools**" page. The **"Display Changes"** will load.

Display Changes

Display changes from prior approved review

Performance Benchmarks

None

3 The **"Display Changes"** page provides a side-by-side comparison of the current Action Plan to the previously approved Action Plan. Lines that contain changes are highlighted for easy identification. The top of the page also displays how many differences there are between the two versions and across how many lines.

Number of differences: *60* differences from *25* lines.

	Current		Prior
- 1	Action Plan	1	Action Plan
2		2	
3	Grantee: New Jersey	3	Grantee: New Jersey
4		4	
5	Grant: B-08-DN-34-0001	5	Grant: B-08-DN-34-0001
6	Grant Award Amount: 51,470,620.00	6	Grant Award Amount: 51,470,62
7	LOCCS Grant Amount: 51,470,620.00	7	LOCCS Grant Amount: 51,470,62
- 8	Estimated PI: 1,242,779.93	8	Estimated PI: 1,241,779.93
- 9	Total Budget: 52,712,399.93	9	Total Budget: 52,712,399.93
10		10	

B3. Grantee and HUD | Action Plan Review Checklist

The Action Plan checklist allows Grantees and HUD to review Action Plans using a semi-automated checklist. The Action Plan Review checklist includes a series of questions, some of which will have System-calculated answers. This allows Grantees to identify some issues with the Action Plan submissions that would be highlighted by the HUD CPD Representative in its review. By using the checklist prior to submission, the Grantee is able to address concerns before they arise in HUD's review.

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Grantee and HUD User access to the Action Plan Checklist.	
✓ Complete the following steps to view the "Review Checklist" page:	
1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Sections A1 and A2 above. Select the **<Review Tools>** link. The **"Review Tools"** page will load.	

The remainder of this page intentionally left blank.

Action Plans

Review Tools

Grant Number:

B-18-DP-13-0001

Grantee Name:

Georgia

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

Display Changes

Display changes from prior approved review

Performance Benchmarks

None

Review Checklist

Review Checklist

Flags

Active Action Plan Flags:

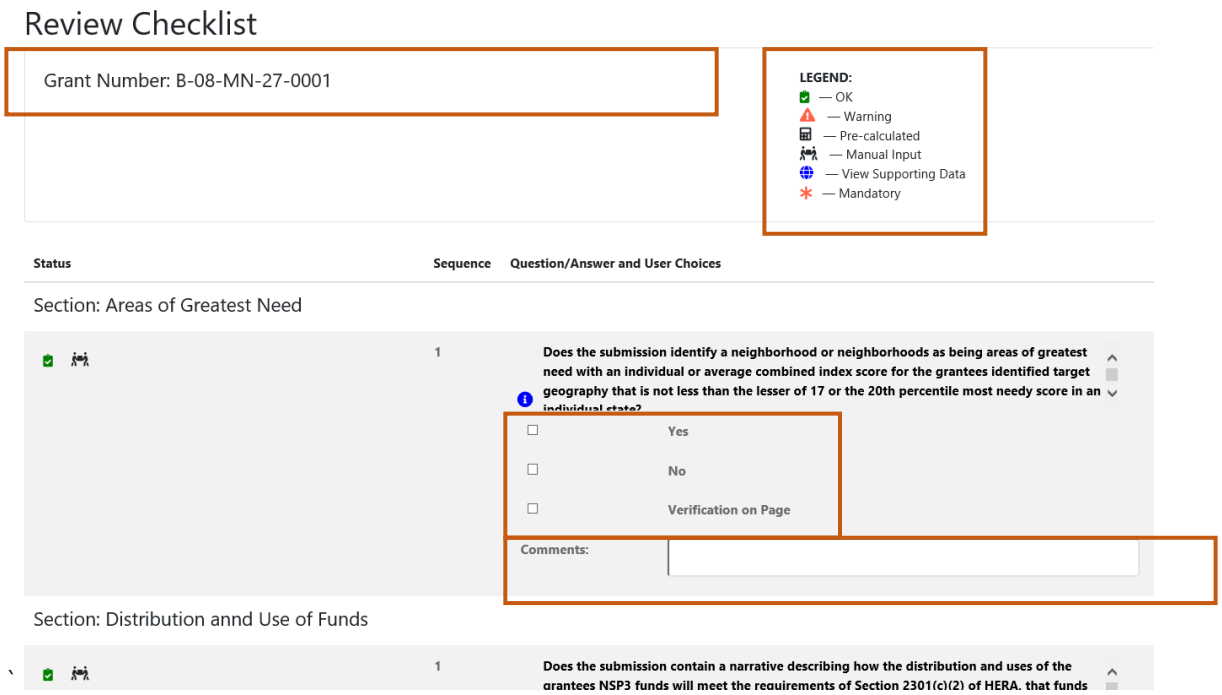
Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2 Select the **<Review Checklist>** link on the Action Plan "**Review Tools**" page. The **"Review Checklist"** page loads.

Review Checklist

Review Checklist

2 The **"Review Checklist"** page is customized to each appropriation. Many questions will have "Yes" or "No" responses while some request figures. Other questions provide an opportunity for comment. The "Review Checklist" legend shows icons that help to describe each type of question on the checklist. The chart below describes each icon in the legend.



Review Checklist Legend Icons

ICON	DESCRIPTION
— OK	The "OK" icon indicates that a question has been satisfied and no further action is needed.
— Warning	The "Warning" icon indicates that action is needed to ensure compliance. Questions that are mandatory and do not have a response will be displayed with a warning icon.
— Pre-calculated	The "Pre-calculated" icon indicates questions that are auto computed by the DRGR System. If a response to a checklist question is auto computed, then the DRGR System displays a non-editable answer. Although auto computed responses may not be edited, the user can add comments.
— Manual Input	The "Manual Input" icon indicates questions that are not auto computed and need to be completed manually.

— View Supporting Data	The "View Supporting Data" icon indicates questions that have been configured to display the supporting data associated with the question's auto computed responses. On selection of this icon, the System will open a new window to display the supporting data.
* — Mandatory	The "Mandatory Questions" icon indicates questions that must be answered before submission.

B4. Grantee and HUD | Review Active Flags

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Grantee and HUD Users to review summaries of Active Flags.	

Complete the following steps to view the Active Action Plan Flags:

1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Sections A1 and A2 above. Select the **<Review Tools>** link. The **"Review Tools"** page will load.

Action Plans

Review Tools

Grant Number:

B-18-DP-13-0001

Grantee Name:

Georgia

Grantee Submission Comments:

None

HUD Review Comments:

None

HUD Review Supporting Documents:

None

Display Changes

Display changes from prior approved review

Performance Benchmarks

None

Review Checklist

Review Checklist

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	AT RISK	OVERALL BENEFIT 75 PCT		08/02/2020

2 The **"Review Tools"** page provides a summary of all "Active Action Plan Flags" and "Active Project and Activity Flags." Summary/view only information is provided for each active flag. Detailed steps related to Grantees resolving and remediating of active flags and HUD's comments on active flags are described in Chapter 32 – Compliance: Flags. Grantees should resolve or remediate flags prior to submitting the Action Plan.

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	COMPLIANCE	PLANNING CAP EXCEEDED DR		08/04/2019

Active Project and Activity Flags:

None

C. HUD Alternate Access to Review Tools

As described above, both Grantees and HUD CPD Representatives use the Review Tools features to assist in their role. Grantees use the tools to ensure a quality and compliant submission. HUD CPD Representatives use the tools to facilitate their review and ensure compliance. In addition to accessing the Review Tools features from the **"Review Tools"** page as described in Section B above, HUD CPD Representatives can access the Display Changes feature from the **"Action Plan Review"** page that loads after selecting the **<Review Action Plan>** link.

Note the difference between HUD's use of the "**Action Plan Review"** page and the **"Review Tools"** page.

- The Review Screen is the page that loads after selecting the **<Review Action Plan>** link. On the **"Action Plan Review"** page HUD Users approve or reject the Action Plan and enter review comments.
- In contrast, the **"Review Tools"** page provides a summary of all Grantee and HUD user review actions.

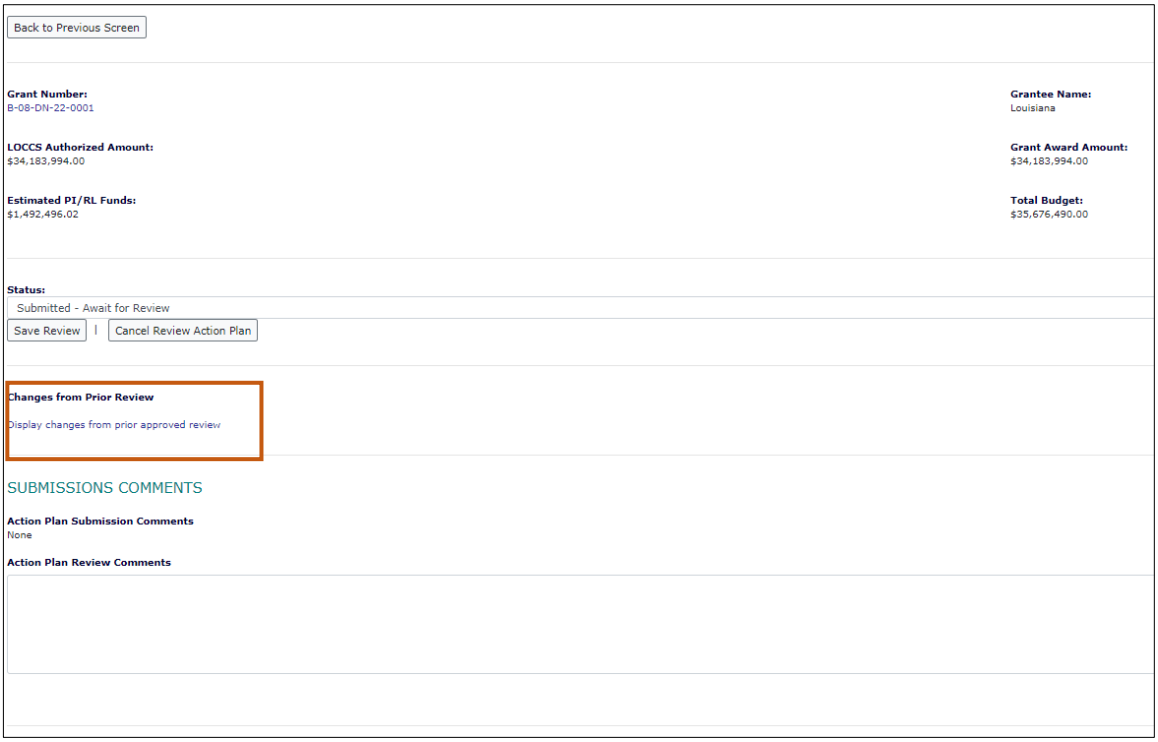
C1. HUD | Access to Review Tools from the Review Action Plan Page

User Role: HUD User	**Menu Item:** Review Action Plan
Purpose: Allow HUD Users to access Review Tools from the **"Review Action Plan"** page.	
✓ Complete the following steps to access Review Tools from the "Review Action Plan" page:	
1 Navigate to the **Manage My Grants** module and locate the **Action Plan** menu. See Sections A1 and A2 above. Select the **<Review Tools>** link. The **"Review Action Plan"** page will load.	

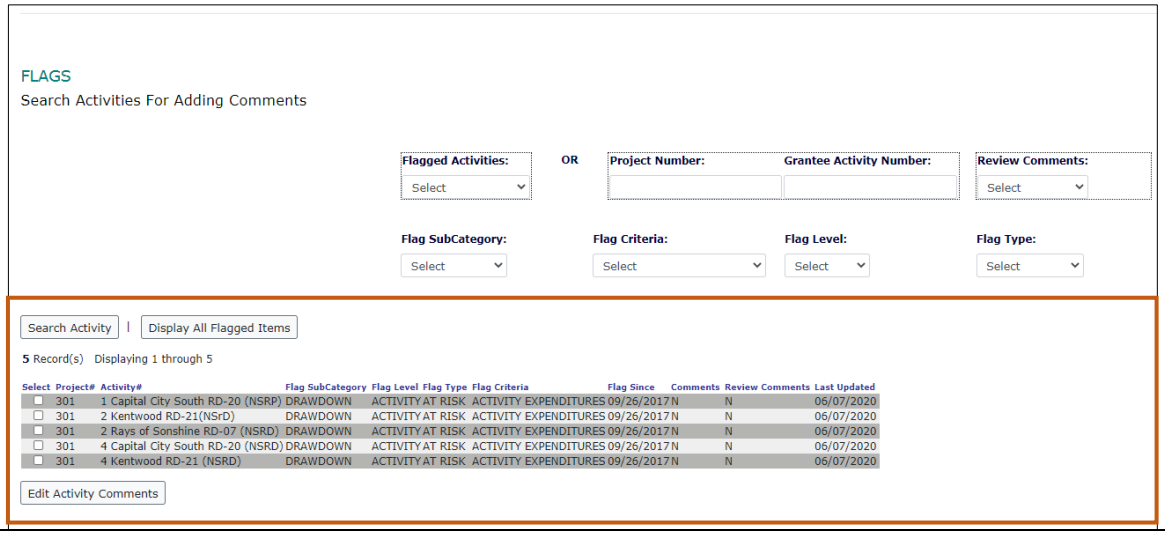
2 The process for entering review comments and changing the status of the Action Plan are discussed in detail in Chapter 16 – Action Plan Submission and Approval. In addition to these functions, the **"Review Action Plan"** page includes direct access to certain Review Tools.

On the **"Review Action Plan"** page, the HUD CPD Representative will find:

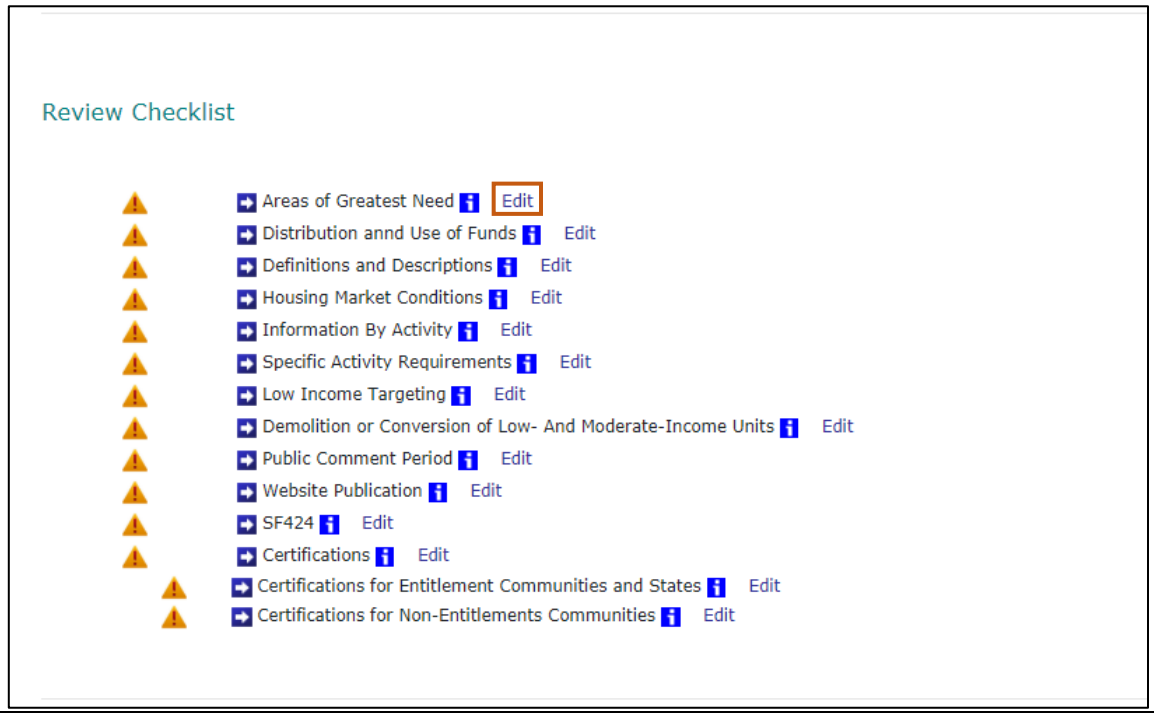
(a) a direct link to Display Changes;



(b) the ability to search for active flags to provide comments; and



(c) a summary of Checklist items to review with **<Edit>** links that direct the reviewer to the Checklist,



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

Chapter 16: Action Plan Submission and Approval | Manage My Grants Module 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Action Plan Submissions 2

B1. Action Plan Status 2

B2. Review Tools 3

B3. Troubleshooting 3

B4. Grantee | Submit Action Plan 4

C. Action Plan Reviews 6

C1. Grantee | Submit Action Plan 7

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

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

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

Grantee Users

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

HUD Users

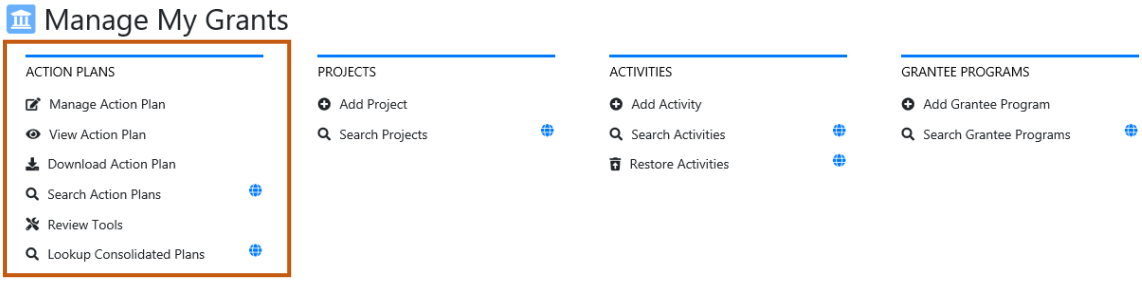
Menu Option	Subsection	Action
Review Action Plan	C1	Review Action Plan

A. Manage My Grants Module Access

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

A1. Grantee | User Access

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



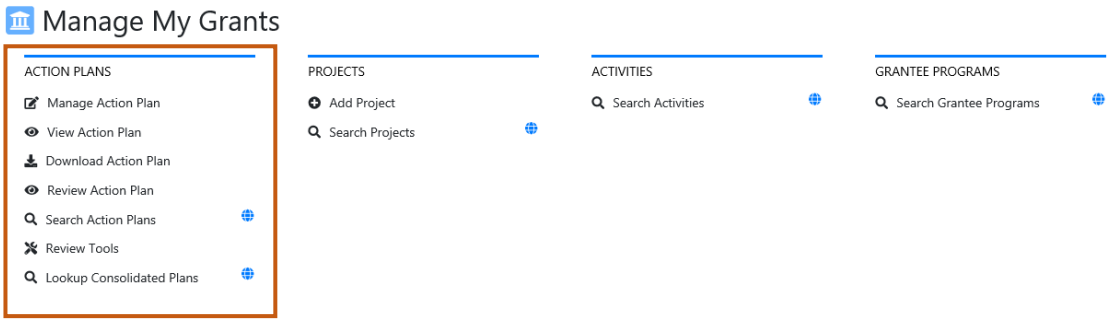
A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Action Plan actions.	

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. Functions available are displayed under each menu.



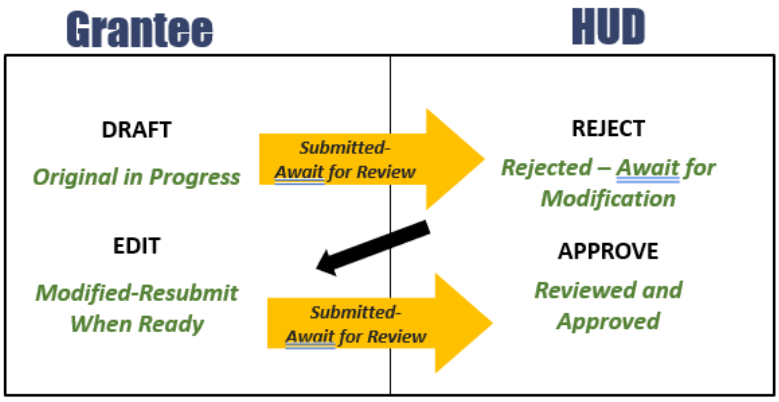
B. Action Plan Submissions

B1. Action Plan Status

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

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

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



B2. Review Tools

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

B3. Troubleshooting

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

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

- **An Action Plan cannot be submitted unless the Grantee User has the 'Submit Action Plan' role.** Only users with the 'Submit Action Plan' role can submit action plans. Grantee Users can, however, edit Action Plans, even without the 'Submit Action Plan' role. See Chapter 5 – User Management and Certification for instructions on adding additional user roles.

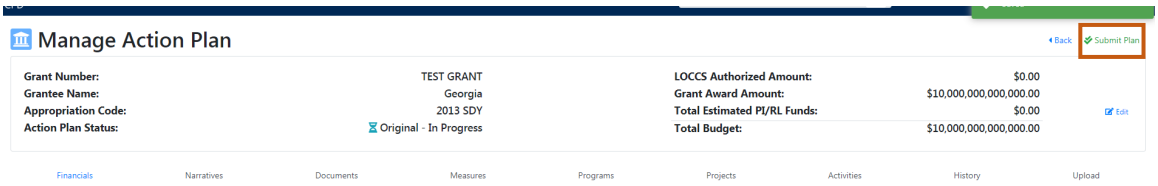
- **An Action Plan in a status of 'Submitted – Await for Modification' cannot be modified.** If a Grantee user has submitted the Action Plan, it cannot be edited until a HUD user has either rejected or approved the action plan. To resolve this issue, contact your HUD CPD representative.

- **An Action Plan for a Grant with a QPR in a status of 'Submitted – Await for Modification' cannot be submitted.** Performance Reports depend on data from the action plan. Although not recommended, Grantee users can 'edit' an action plan while a performance report is in 'Submitted – Await for Modification' status. However, an action plan cannot be 'submitted' until a HUD User that can view the Grant has either rejected or approved the performance report. To resolve this issue, contact your HUD CPD representative.

- **If an Action Plan cannot be edited it may be because (1) the Grantee is not active, (2) the Grant is not active, or (3) the user does not have edit capabilities.** Grantee DRGR accounts designated as 'View Only' cannot edit action plans or performance reports, however, Regular Grantee Users associated to a Grant can edit the action plan without additional roles. If a Grantee or Grant is not showing as active in DRGR, this may be a mistake by HUD's DRGR System administrators. Contact your Grantee System administrator or DRGR_Help@hud.gov.

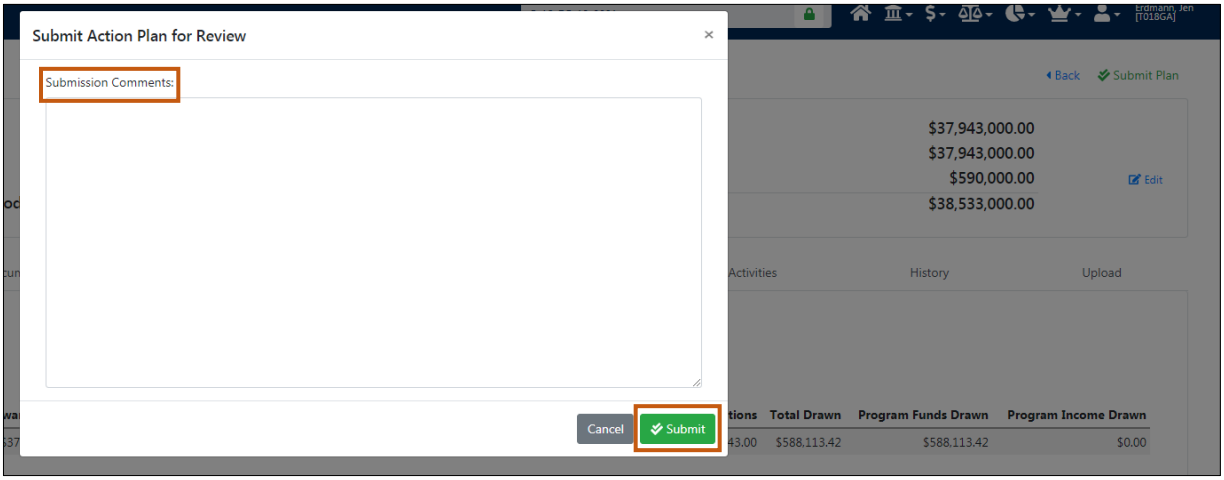
B4. Grantee | Submit Action Plan

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

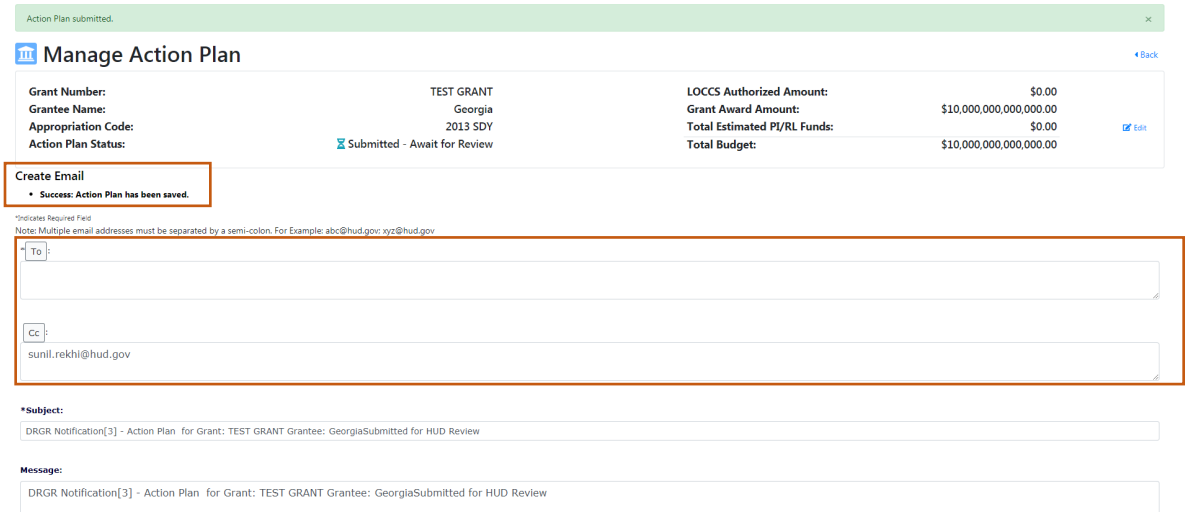
User Role: Grantee User	**Menu Option:** Manage Action Plan
Purpose: Allow Grantee Users to submit the DRGR Action Plan for HUD review.	
Complete the following steps to submit a DRGR Action Plan:	
1 After using the Review Tools outlined in Chapter 14 of the DRGR User Manual, navigate to the **Manage My Grant** or icon from the main navigation bar and select the **<Manage Action Plan>** link under the Action Plan menu. See Section A1 above. The **"Manage Action Plan"** page will load for the Grant selected in the locked Grant bar. Select **<Submit Plan>** in the upper right-hand corner of the page. 	
2 After selecting **<Submit Plan>**, a page will load that allows Grantees to include submission comments. Note, it is recommended to include submission comments for the HUD CPD Representative regarding	

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

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



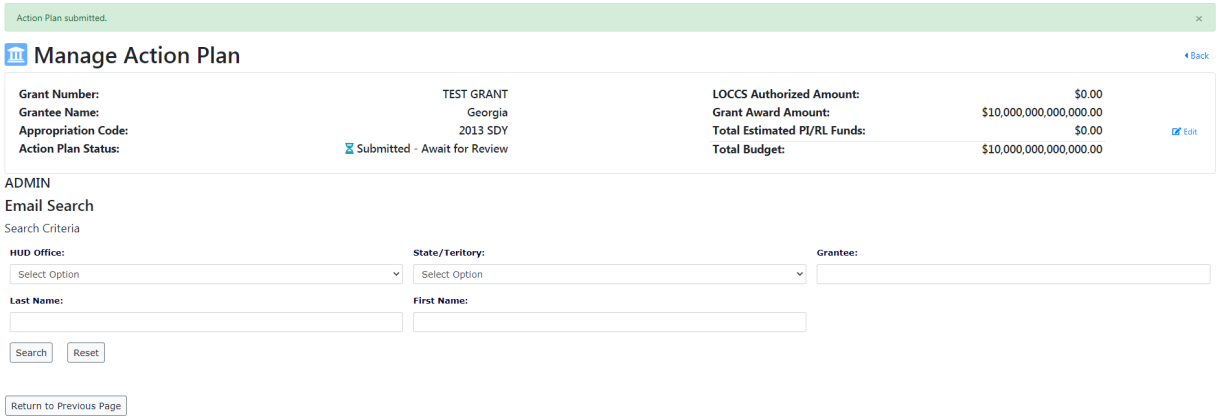
3 After selecting **<Submit>** on the **"Submit Action Plan for Review"** page to submit the plan, DRGR will load a **"Create Email"** page to allow the Grantee user to notify the reviewer(s) that the Action Plan is ready for review. This page will also display a "Success: Action Plan has been saved"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



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

User Role: Grantee User	Menu Option: Manage Action Plan

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

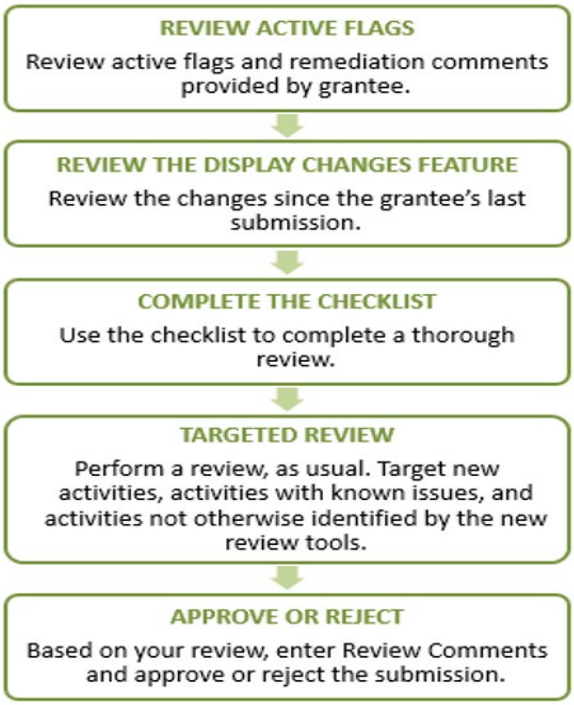


C. Action Plan Reviews

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

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

The remainder of this page intentionally left blank.



C1. HUD | Review Action Plan

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

User Role: HUD User	**Menu Option:** Review Action Plan
Purpose: Allow HUD Users to review and approve or reject the DRGR Action Plan.	
Complete the following steps to review and approve or reject a DRGR Action Plan:	
1 After using Review Tools outlined in Chapter 14 of the DRGR User Manual, navigate to the **Manage My Grant** or icon from the main navigation bar and select the **<Review Action Plan>** link under the Action Plan menu. See Section A2 above. The **"View All Action Plans"** page will load. Select the Grant number link for an Action Plan that has been submitted for review.	

User Role: HUD User	**Menu Option:** Review Action Plan

ACTION PLANS

View All Action Plans

- **Action plan cannot be reviewed unless in submitted status.**

1 Page 2 >

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

2 The **"Review Action Plan"** page loads. From this page the HUD user can easily:

a. Select the link to display changes from the previously reviewed and approved Action Plan;

b. Review submission comments from the Grantee; and

c. Add supporting documents to the review.

Back to Previous Screen

Grant Number:
B-08-DN-22-0001

Grantee Name:
Louisiana

LOCCS Authorized Amount:
$34,183,994.00

Grant Award Amount:
$34,183,994.00

Estimated PI/RL Funds:
$1,492,496.02

Total Budget:
$35,676,490.00

Status:
Submitted - Await for Review

Save Review | Cancel Review Action Plan

Changes from Prior Review

Display changes from prior approved review

SUBMISSIONS COMMENTS

Action Plan Submission Comments
None

Action Plan Review Comments

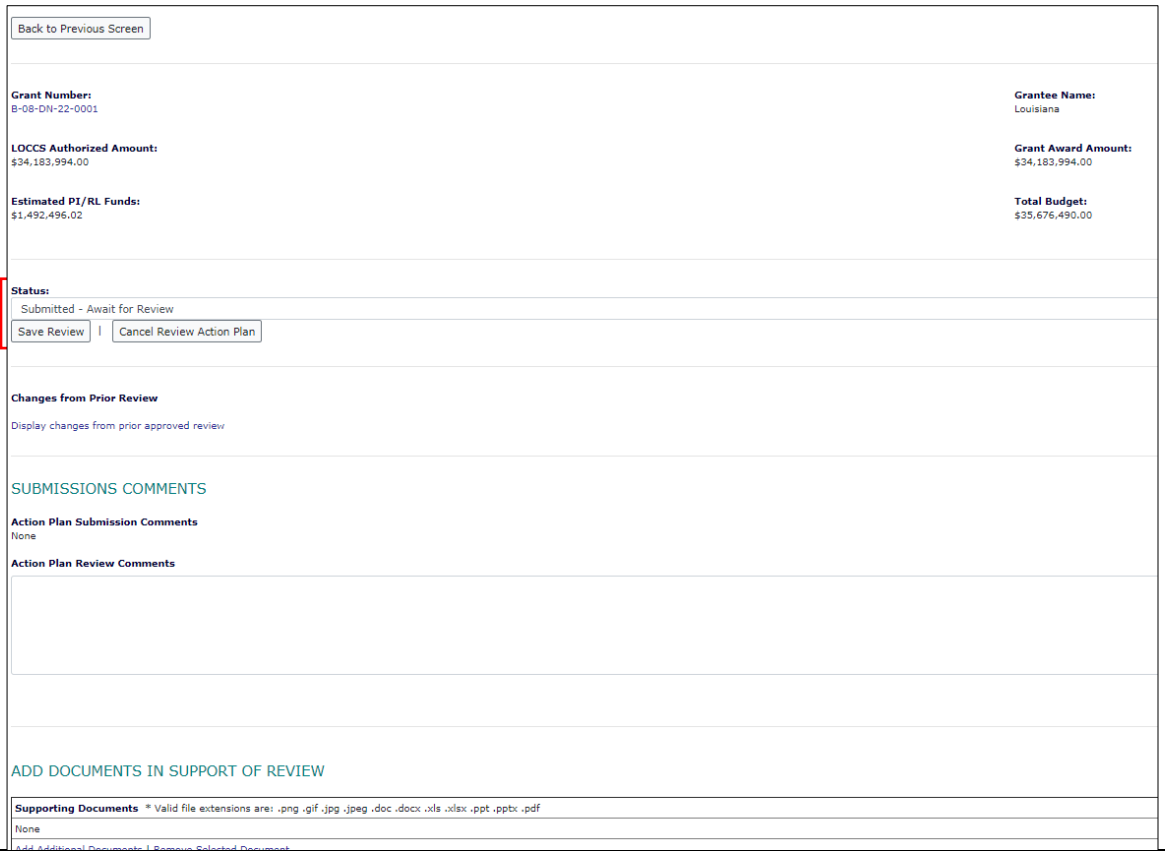
ADD DOCUMENTS IN SUPPORT OF REVIEW

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

None

Add Additional Documents | Remove Selected Document

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



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

Chapter 17: Technical Assistance Work Plans 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

B. Add Work Plans 2

B1. Grantee | Add Work Plan 2

C. Search, Edit, or Delete Work Plans 2

C1. Grantee | Search for Work Plans 2

C2. Grantee | Edit Work Plans 4

C3. Grantee | Delete Work Plans 6

D. Upload Work Plan Data 7

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

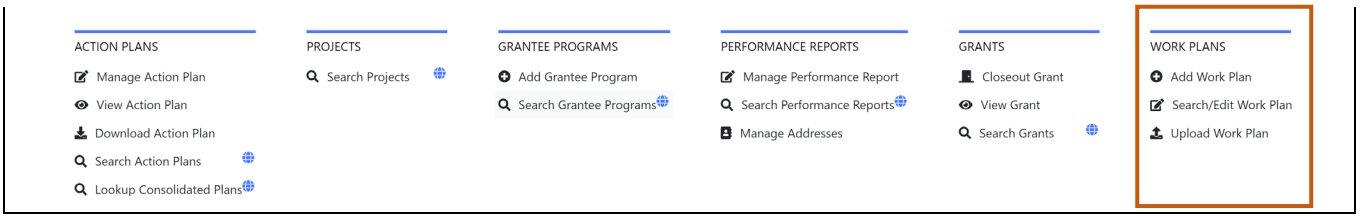
Menu Option	Subsection	Action
Add Work Plan	B1	Add TA Work Plan to Action Plan
Search/Edit Work Plan	C	Search for and Edit/Delete Work Plans
Upload Work Plan	D	Upload Work Plan information using data upload template

A. Manage My Grants Module Access

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

A1. Grantee | User Access

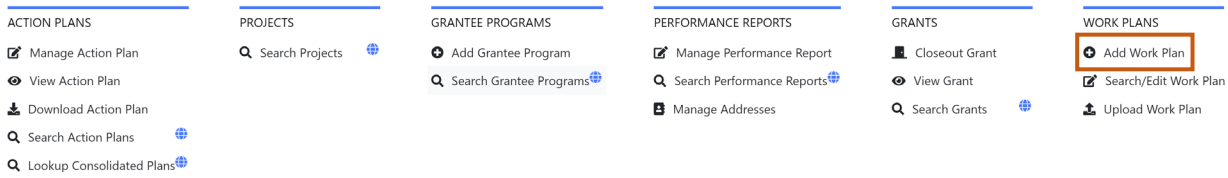
User Role: Grantee User (excluding non-TA Provider User)	**Menu Option:** Manage My Grants Module
Purpose: Allow TA Provider Users to access Work Plan actions.	
Complete the following steps to access the Manage My Grants Module:	
1 In the DRGR System, select the **Manage My Grants** module, or icon, 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

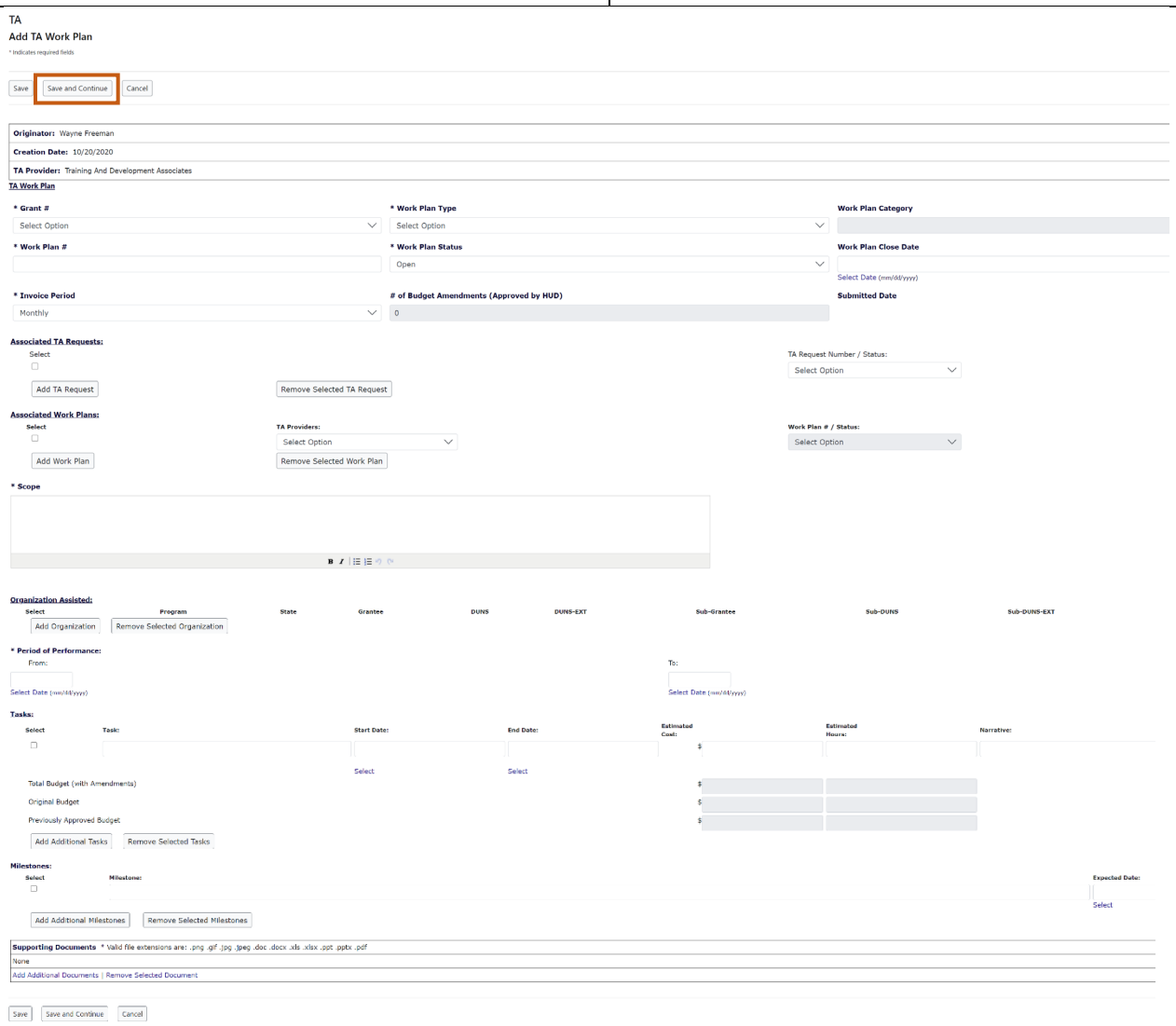
TA Provider Users can add TA Work Plans in DRGR. The ability to add a Work Plan is not available to View Only users.

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:	
1 Navigate to the **Manage My Grants module** or icon. Locate the **Action Plan** menu as described in Section AI above. Select <**Add Work Plan.**>. The **"Add TA Work Plan"** page will load. 	
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>**.	

The remainder of this page intentionally left blank.

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



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.

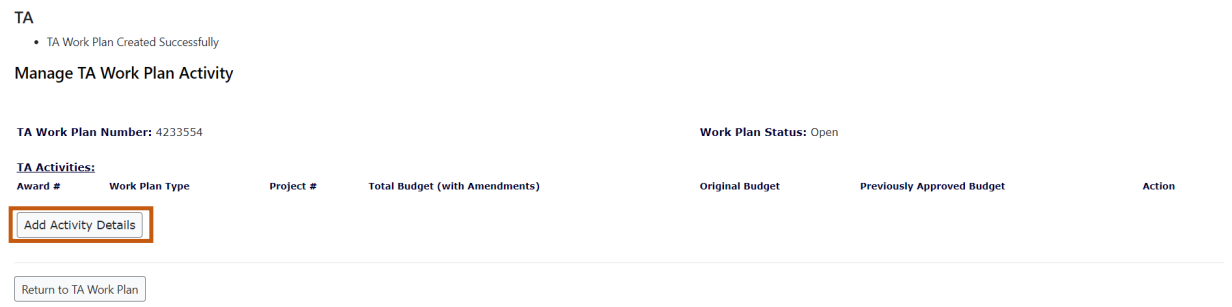
The **"Manage TA Work Plan Activity"** page includes the "TA Work Plan Number" and "Work Plan Status" from page 1. The remaining information – under "TA Activities" – will populate after completing information under "Add Activity Details."

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.

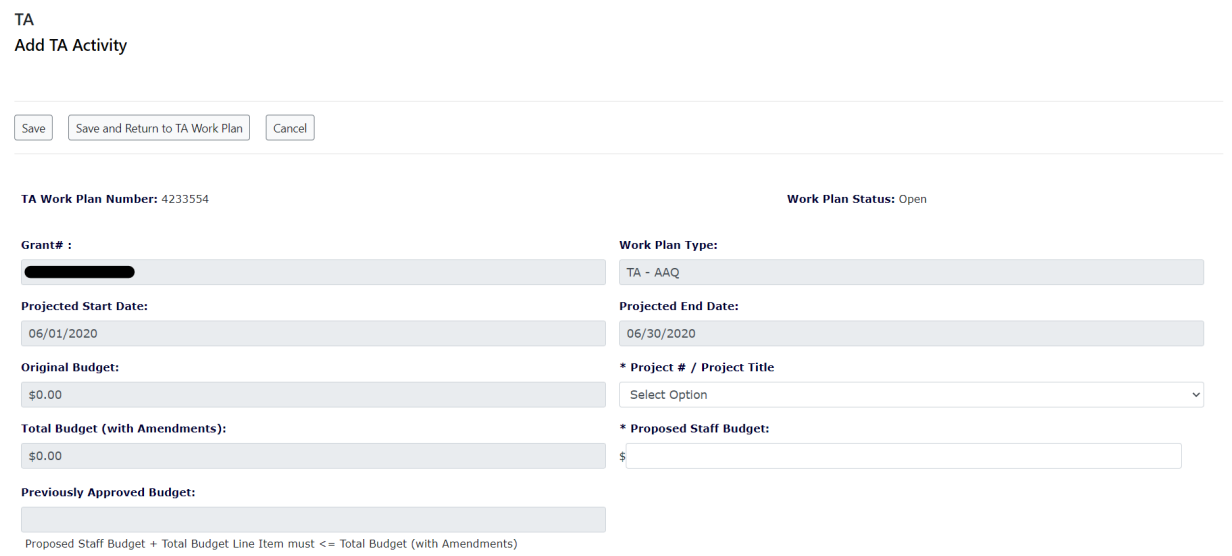
TIP: If the DRGR System displays errors, be sure that:

- 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



4 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.



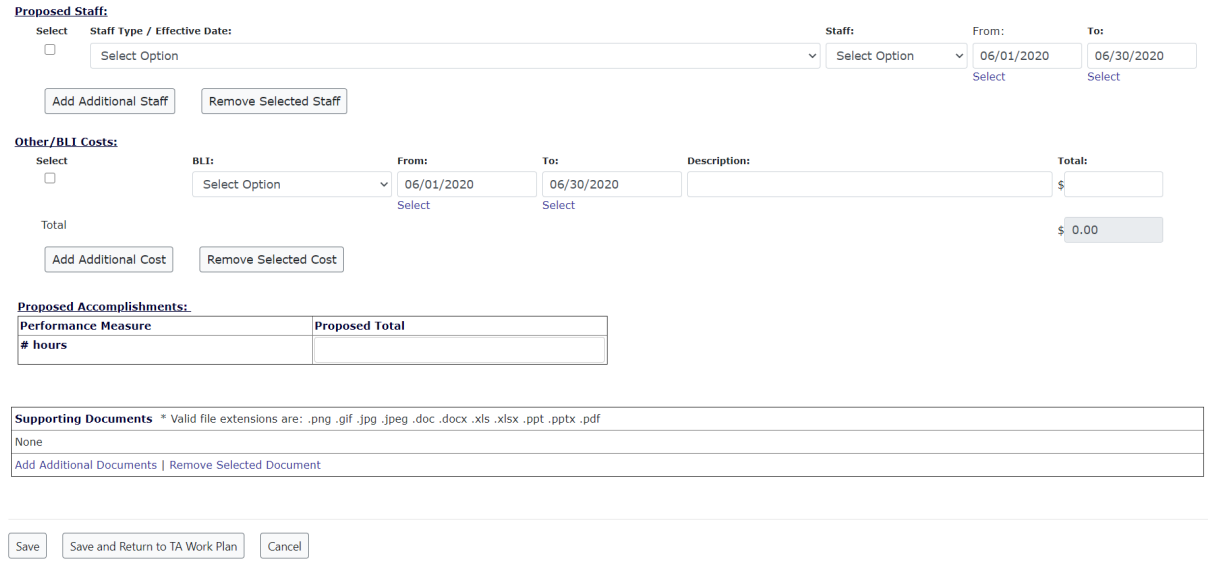
"Project #/Project Title" and the remaining information is completed by the TA Provider User.

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.

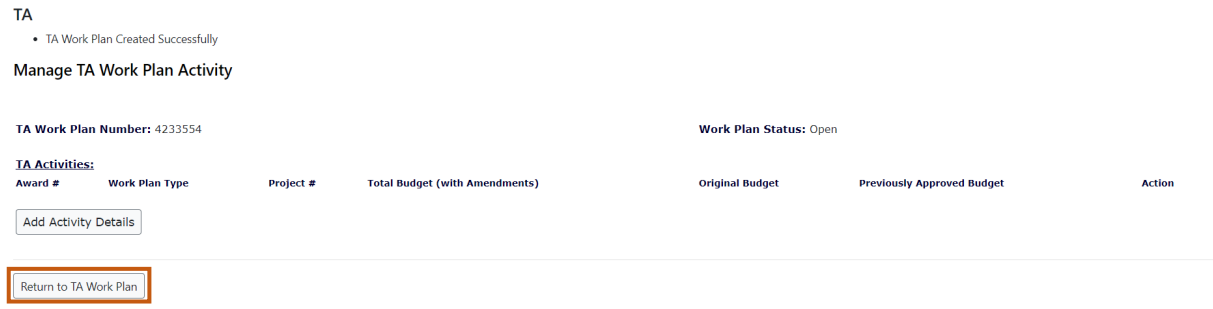
Guidance and tips on required information and how to complete these steps is provided in the "Tips for Completing Data Fields In the Add Work Plan Function" table below.

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

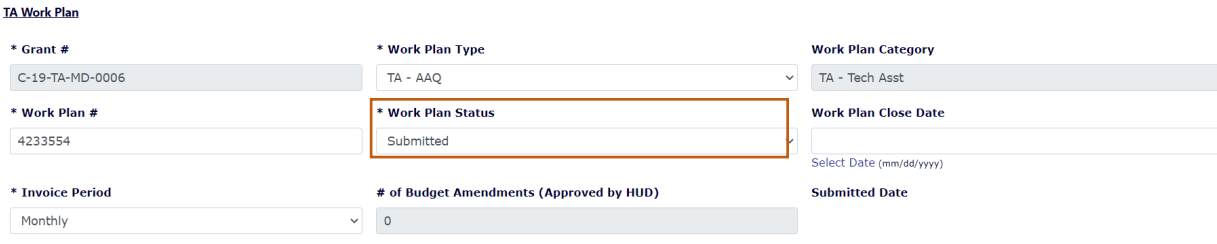
User Role: Grantee User (excluding non-TA Provider User)	**Menu Option:** Add Work Plan



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



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.



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

<table>
<tr><th>Page</th><th>Field</th><th>Tip</th></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>Originator</td><td>The System displays the name of the TA Provider user who created the Work Plan.</td></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>Creation Date</td><td>The System displays the date the Work Plan was created.</td></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>TA Provider</td><td>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.</td></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>Award #</td><td>Select the Grant number from the “Award #” dropdown menu.

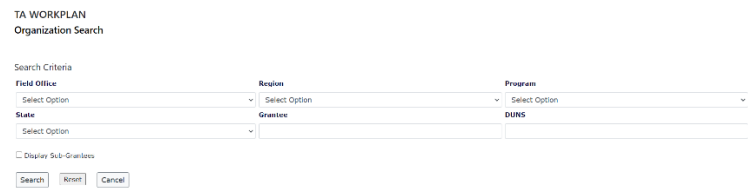
If the Grant number is not listed in the dropdown, the user may not be associated with the missing Grant. See Chapter 5 – User Management and Certification for steps on associating users to Grants.

NOTE: TA Providers must be sure to use older funds for work plans, provided the award documents allow for the work plan scope.</td></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>Work Plan Type</td><td>Select the Work Plan type from the “Work Plan Type” dropdown menu. The Work Plan Type dropdown is dependent on the Award # selected.

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.
<table>
<tr><th>Work Plan/Activity Type</th><th>Work Plan/Activity Category</th></tr>
<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>
</table></td></tr>
<tr><td>Add TA Work Plan – Page 1</td><td>Work Plan Category</td><td>The “Work Plan Category” is populated based on the selected Work Plan type.

NOTE: The work plan category in DRGR should reflect the appropriate option, based on the NOFA eligible activities compared to the work plan scope.</td></tr>
</table>

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	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. 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.
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.

Add TA Work Plan – Page 1	Scope	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. Use the options under the Scope field, to format, undo, or re-do text.
Add TA Work Plan – Page 1	Organizations Assisted	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. 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. 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. 
Add TA Work Plan – Page 1	Period of Performance	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.
Add TA Work Plan – Page 1	Task	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. 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.
Add TA Work Plan – Page 1	(Task) Start Date and End Date	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.

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. **Supporting Documents** * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf None Add Additional Documents | Remove Selected Document
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	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. **Tips on Proposed Staff Budget** The following financial constraints apply to the Proposed Staff Budget: • 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 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. 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.
Add TA Activity – Page 2	Staff Type/Effective	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. Select **<Add Additional Staff>**, to add multiple Staff Types or Staff.
Add TA Activity – Page 2	Staff	Select the Staff from the dropdown menu. Select **<Add Additional Staff>**, to add multiple Staff Types or Staff.
Add TA Activity – Page 2	From / To	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.
Add TA Activity – Page 2	Hours	In the Hours field, enter the hours associated with the staff.
Add TA Activity – Page 2	Rate	The Rate field is populated based on selected "Staff Rate/Effective Date."
Add TA Activity – Page 2	Total	The Total fields are calculated based on the rates and hours.

Add TA Activity – Page 2	BLI	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. Select a budget link item (BLI) from the "BLI" dropdown menu. The menu includes the following options: • 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. Select **<Add Additional Cost>** to add multiple BLIs. To remove BLIs, click the checkbox next to the item to be removed and select **<Remove Selected Cost>.**
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	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. 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 **<Remove Selected Document>**. Select **<Save>** to save information on page 1 of the work plan, and remain on the page. **Supporting Documents** * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf None Add Additional Documents | Remove Selected Document

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.

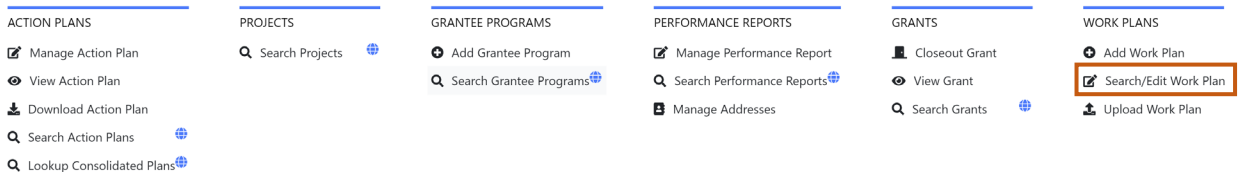
When editing a TA Work Plan, the Work Plan status will change to "Modified." TA Provider Users must change the status to "Submitted," so that the Work Plan can be re-approved by HUD. TA Providers can also upload Work Plan edits (see Chapter 34 – Data Uploads for more information).

C1. Grantee | Search for Work Plans

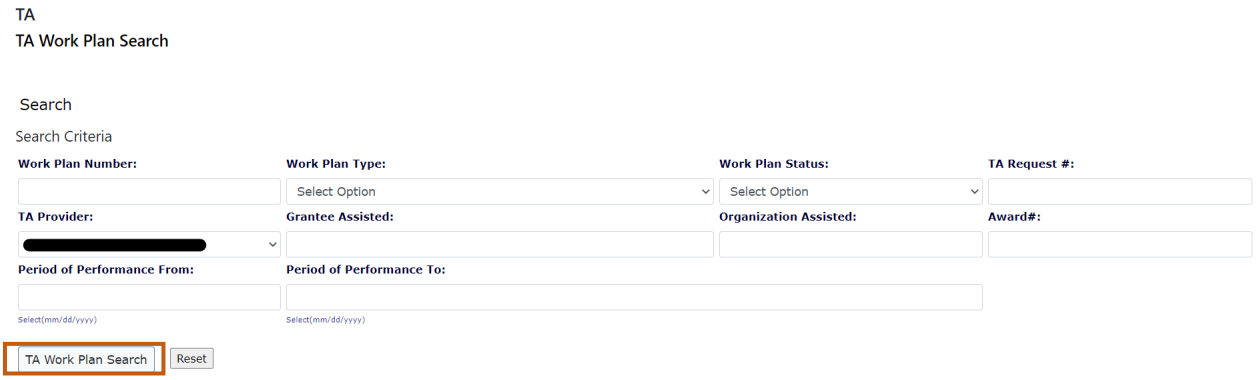
User Role: Grantee User (excluding non-TA Provider User)	**Menu Option:** Search/Edit Work Plan
Purpose: Allow TA Provider Users to search for a DRGR Work Plan.	

Complete the following steps to search for a DRGR Work Plan:

1 Navigate to the **Manage My Grants module** or icon. Locate the **Action Plan** menu as described in Section AI above. Select <**Search/Edit Work Plan.**>. The **"TA Work Plan Search"** page will load.



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.

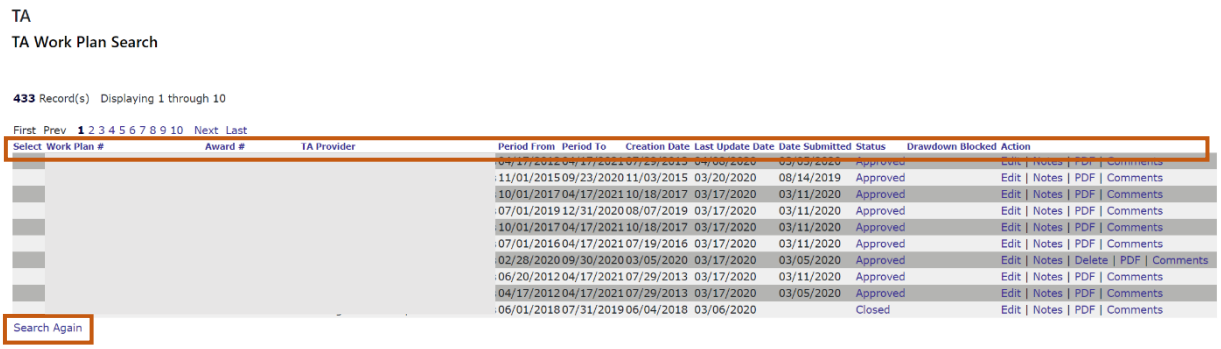


3 The results display key features of the TA Work Plan: "Workplan#," "TA Provider," "Performance Period," "Creation Date," "Last Update Date," "Date Submitted," "Status," "Drawdown Blocked,", and allowable functions based on the user role in the "Actions" column.

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

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.

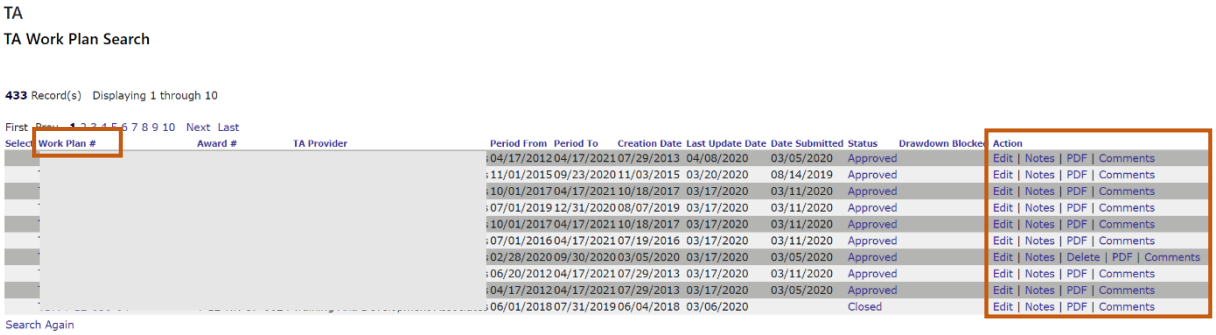


4 To view the TA Work Plan, select the **<Work Plan#>** hyperlink in the "Work Plan #" column for the desired Work Plan.

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.



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

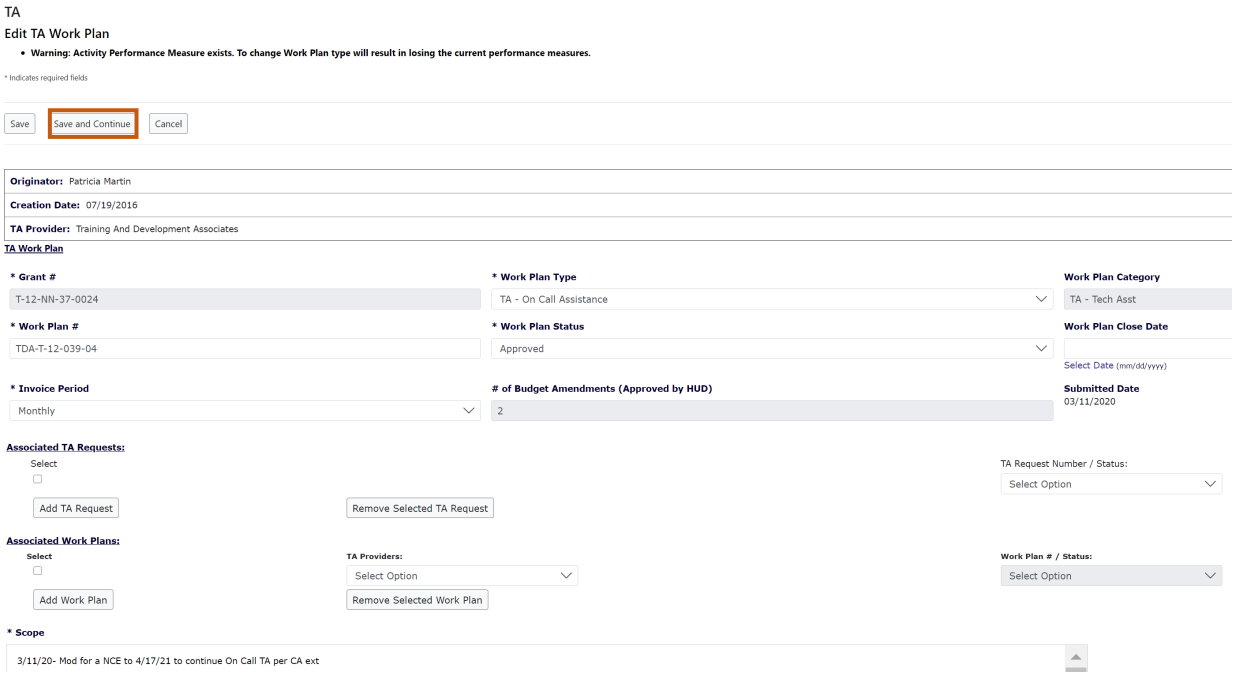
Purpose: Allow TA Provider Users to edit a DRGR Work Plan.

Complete the following steps to edit a DRGR Work Plan:

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.

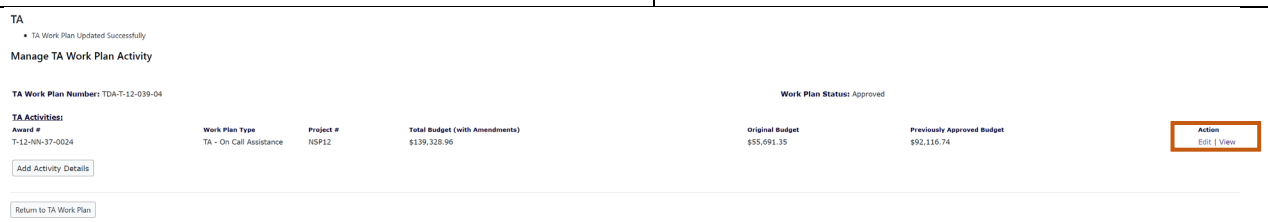
2 On the **"Edit TA Work Plan"** page, TA Provider Users see the same fields that were populated during the add work plan process (see section B above). Edit available fields as appropriate and select **<Save and Continue>** to save changes and load the **"Manage TA Work Plan Activity"** page.

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.

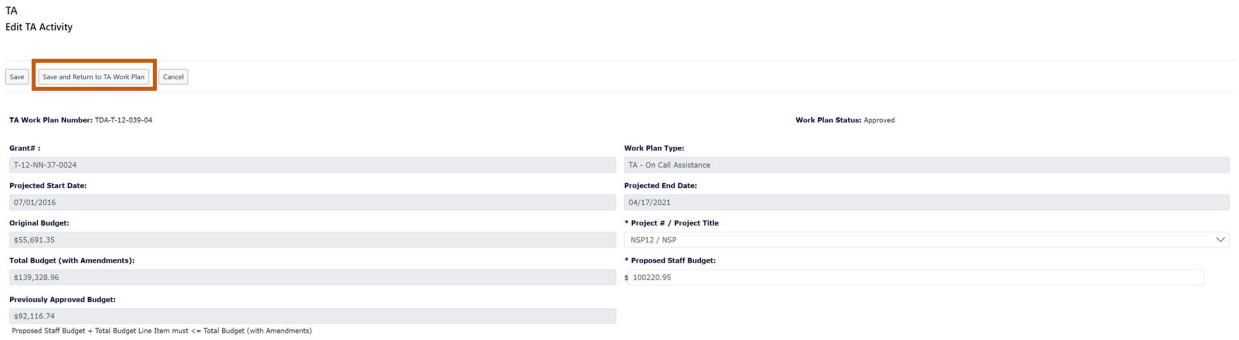


3 On the **"Manage TA Work Plan Activity"** page, select **<Edit>** on any Activity that needs to be edited to load the **"Edit TA Activity"** page.

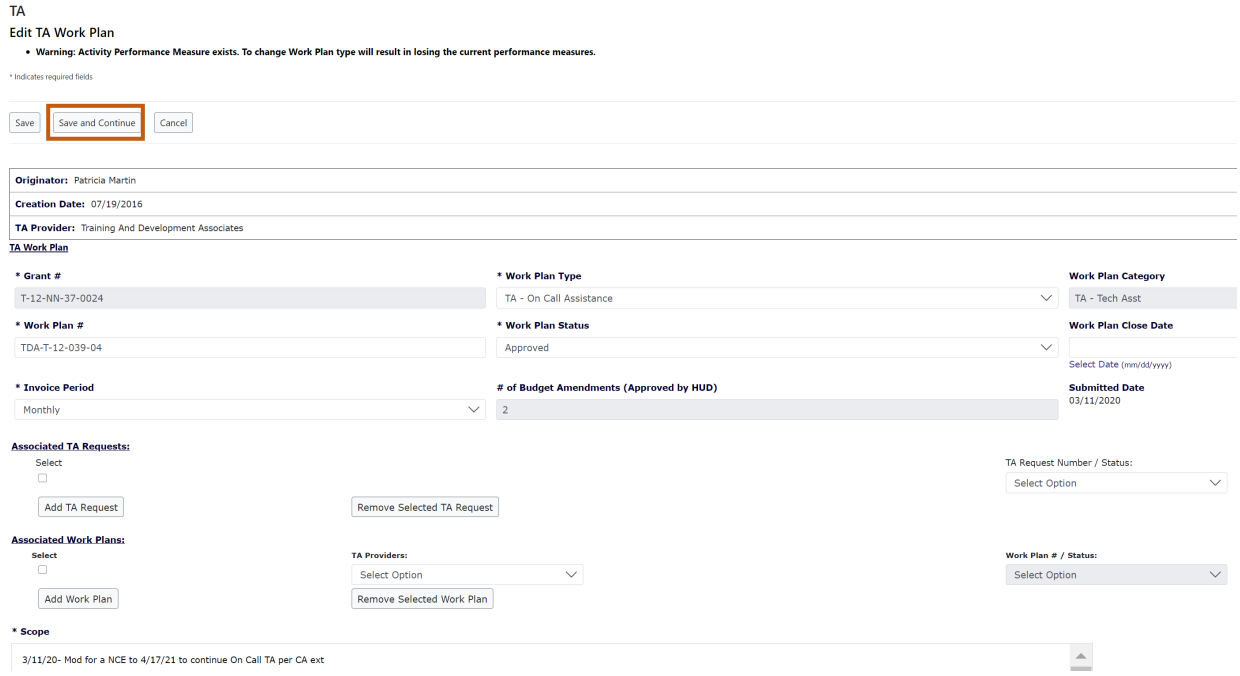
User Role: Grantee User (excluding non-TA Provider User)	**Menu Option:** Search/Edit Work Plan



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



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>**.



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

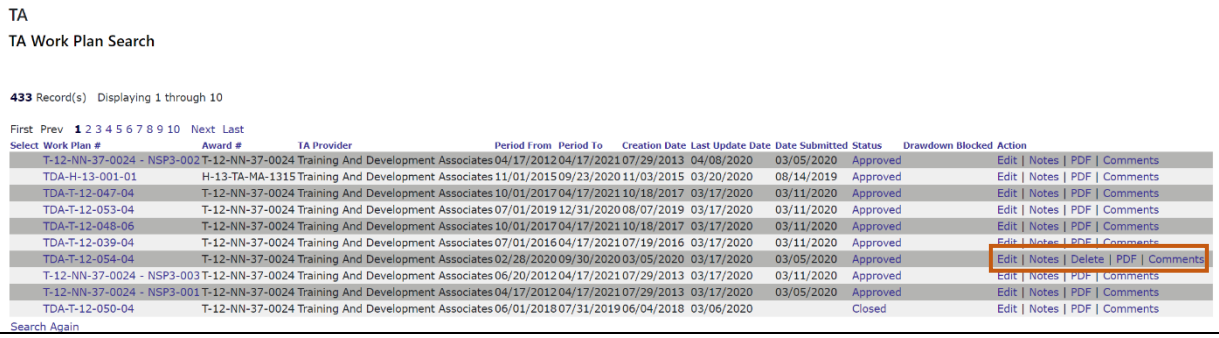
A TA Work Plan may only be deleted if the Work Plan has no associated draws/vouchers. If the TA Work Plan has at least one draw/voucher, then the **<Delete>** link will not show.

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:

1 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

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
	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.

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.

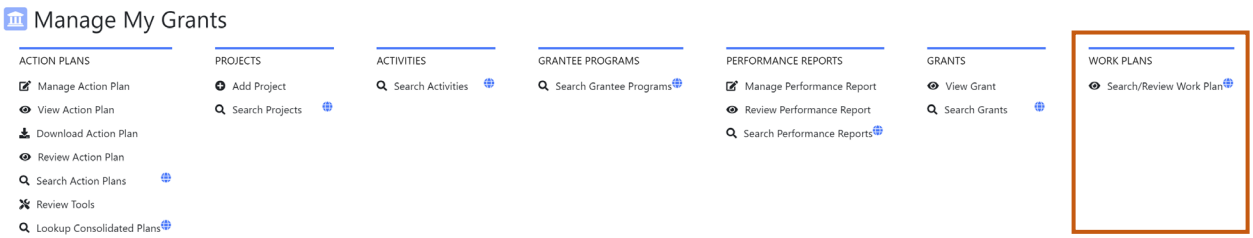
A1. HUD | User Access

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:

1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation menu.

2 This opens the dropdown menu items for the **Manage My Grants** module. The DRGR System displays the relevant menu items based on HUD User role.



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.

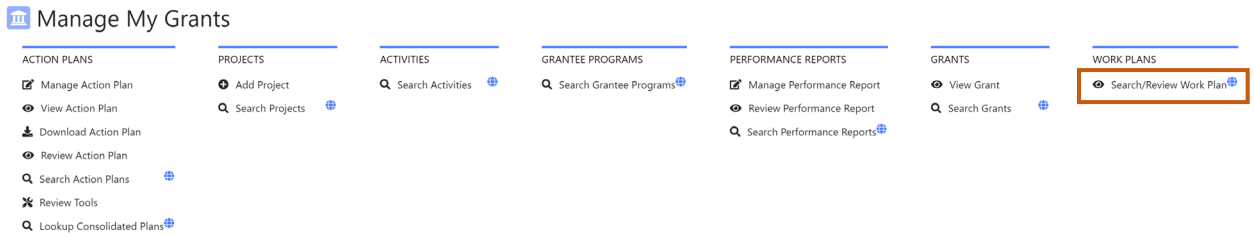
TIP: See Chapter 4 – Grants and Grantees for a discussion of HUD user groups for a grant.

B1. HUD | Review Work Plan

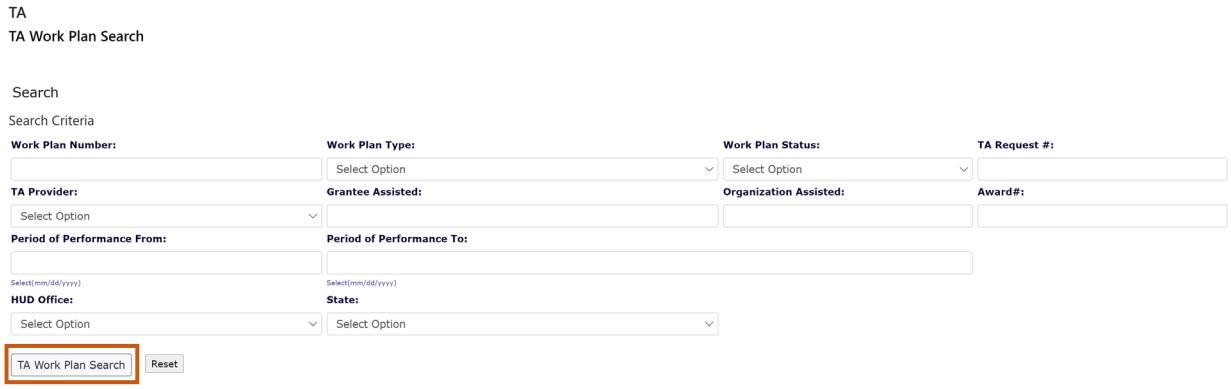
User Role: HUD User	**Menu Option:** Search/Review Work Plan
Purpose: Allow HUD to review a TA Work Plan in DRGR.	

Complete the following steps to add a DRGR Work Plan:

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.



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.



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.

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
☐	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
☐	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
	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
	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
	TEST	T-12-NN-51-0021	ICF Incorporated	11/30/2020	12/30/2021	10/31/2020	10/31/2020		Open		Notes | PDF | Comments
☐	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
☑	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
	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
	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
	mj test workplan 07182020	X-20-TA-8-11174	ICF Incorporated	07/18/2020	07/18/2021	07/18/2020	07/18/2020	07/18/2020	Approved		Notes | Block Drawdown | PDF | Comments
	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
☐	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

Review

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

○Approve ○ Reject

Please enter review comments

Save Cancel

The remainder of this page is intentionally left blank

Chapter 19: Performance Report Overview | Manage My Grants Module

Chapter 19: Performance Report Overview ii

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 1

B. Performance Report Summary 2

B1. Performance Report Overview 2

B2. Review Tools 2

B3. Relationship to Action Plan 2

B4. HUD Review and Approval 3

C. Add New or Missing Performance Reports 3

C1. Grantee | Add New Performance Report 3

D. Search, View and Download Performance Reports 5

D1. Grantee and HUD | Search Performance Reports 5

D2. Grantee and HUD | View Performance Reports 6

D3. Grantee and HUD | Download Performance Reports 7

E. Manage Performance Report – Grant Level 8

E1. Grantee | Select Performance Report Contact 8

E2. Grantee | SF-425 Report (optional) 9

E3. Grantee | Overall Progress Narrative and Submission Comments 11

F. Manage Performance Report – Activity Level 12

F1. Grantee | Edit Performance Report – Direct Benefit Activity 13

F2. Grantee | Edit Performance Report – Area Benefit Activity 18

F3. Grantee | Edit Performance Report – Prior Period Corrections 21

Chapter 19: Performance Report Overview

This Chapter provides procedures for adding, editing, viewing, and downloading Performance Reports contained in the **Manage My Grants** module. This Chapter also summarizes the relationship between the Performance Report and the Action Plan.

Most Performance Reports are due quarterly, so DRGR pages often reference Quarterly Performance Reports (QPRs) instead of Performance Reports. The DRGR System, however, also supports semi-annual and annual Performance Reports.

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

NOTE: For most Grantees, performance reports are due quarterly thirty (30) days after the end of the quarter. However, depending on the Grant appropriation and Grant status, report deadlines and cycles may vary.

Grantee Users

Menu Option	Subsection	Action
Manage Performance Report	C1	Add a New Performance Report
Manage Performance Report	D1	Search for a Performance Report
Manage Performance Report	D2	View a Performance Report
Search Performance Reports	D3	Download a Performance Report PDF
Manage Addresses	--	See Chapter 20
Manage Performance Report	E1-E3	Edit Performance Report (Grant Level)
Manage Performance Report	F1	Edit Performance Report (Activity - Direct Benefit)
Manage Performance Report	F2	Edit Performance Report (Activity - Area Benefit)
Manage Performance Report	F3	Prior Period Corrections

HUD Users

Menu Option	Subsection	Action
Manage Performance Report	D1	Search for a Performance Report
Manage Performance Report	D2	View a Performance Report
Search Performance Reports	D3	Download a Performance Report PDF

A. Manage My Grants Module Access

The **Manage My Grants** module contains access to Performance Report actions.

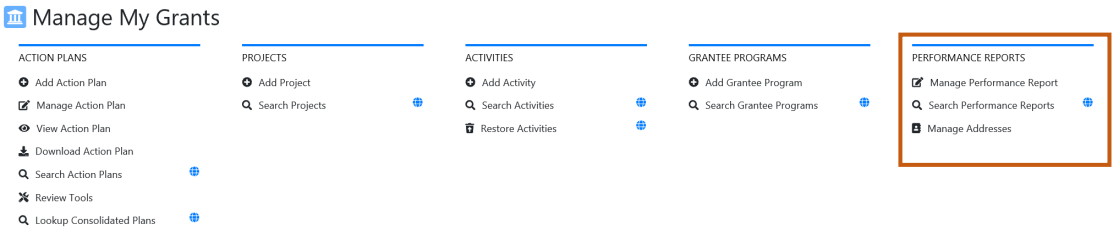
A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Performance Report actions.	

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 System displays the relevant menu items based on user type and user roles.



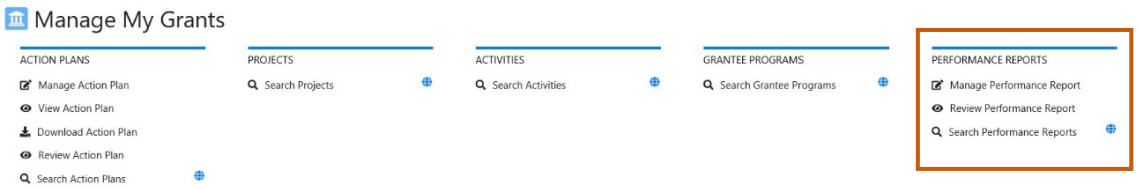
A2. HUD | User Access

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, 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 System displays the relevant menu items based on user type and user roles.



B. Performance Report Summary

B1. Performance Report Overview

The DRGR Performance Report provides a tool and framework for communicating progress on the overall Grant program, as well as individual programs and activities to HUD and the public. Performance Reports measure Grantees' compliance with statutory and regulatory requirements related to their Grant appropriation, such as meeting National Objectives and expenditure milestones, and provide a vehicle for Grantees to tell their story of how investments are achieving results in their communities.

TIP! Accurate and timely data input into Performance Reports is vital for HUD to measure compliance, but also report accomplishments to Congress, the White House, the press, and the public.

B2. Review Tools

Review tools offer Grantee and HUD Users features to aid with compliance (see Chapter 21 – Performance Report - Review Tools). The use of Review Tools as a Quality Assurance / Quality Control (QA/QC) tool is optional, but highly recommended.

B3. Relationship to Action Plan

The contents of the Performance Report are taken directly from the DRGR Action Plan. If an activity is not properly set-up in the Action Plan, missing components will not be available for reporting in the Performance Report. For example, if an accomplishment (e.g., households assisted) is not proposed in the Action Plan, a corresponding field will not be available in the Performance Report to report on actual outcomes.

TIPS!

- The Action Plan proposes accomplishments. The Performance Report records actual outcomes. Ensure proper set up of the Action Plan so that the Performance Report has the appropriate fields for reporting.
- Ensure the Action Plan is in Reviewed and Approved status or the Performance Report cannot be submitted.

Further, to submit a Performance Report, the Grantee's Action Plan must be in 'Reviewed and Approved' status. For Grantees who revise and submit their Action Plans for HUD review and approval, Action Plan changes should be submitted well in advance of Performance Report submission deadlines to allow time for HUD to review and approve the modified Action Plan. See Chapter 16 – Action Plan Submission and Approval for more information. Grantees are encouraged to coordinate with their CPD Representative on the timing of Action Plan submissions to avoid interference with Performance Report submissions.

B4. HUD Review and Approval

Each Performance Report must be submitted to HUD for review and approval by the submission deadline. Note that failure to submit timely Performance Reports can result in findings. (See Chapter 22 – Performance Report Submission and Review) for the steps to submit Performance Reports in DRGR.

TIP: Users must have the Performance Report Submit role in order to submit a Performance Report to HUD. Without this role, the <Submit> link will not be available. For more information on user roles see Chapter 5 – User Management and Certifications.

C. Add New or Missing Performance Reports

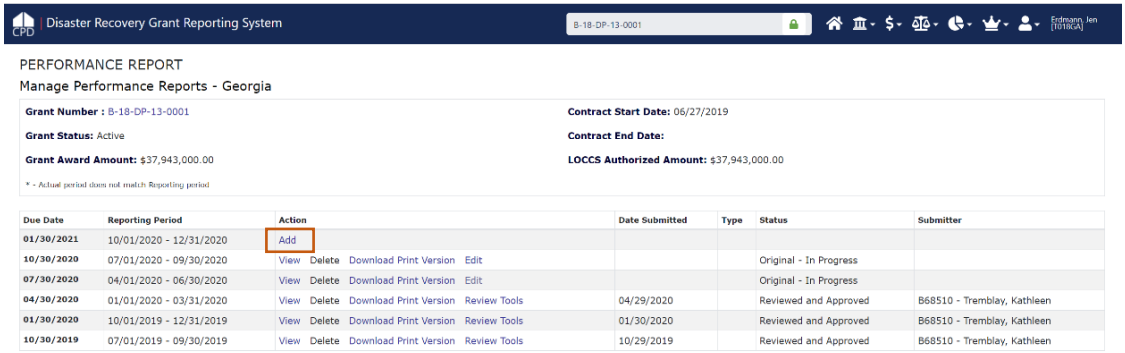
C1. Grantee | Add New Performance Report

New Performance Reports only need to be added if the DRGR System did not generate it automatically.

User Role: Grantee Users	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to add a Performance Report.	

Complete the following steps to add a Performance Report:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. Select the **<Manage Performance Report>** link. See Step A1 above. The **"Manage Performance Report"** page will load. Select the **<Add>** link in the "Action" column next to the desired reporting period.



2 The **"Edit Performance Report"** page will load allowing the Grantee to enter grant-level and activity-level reporting information including:

a. Grantee Contact

b. Overall Progress Narrative

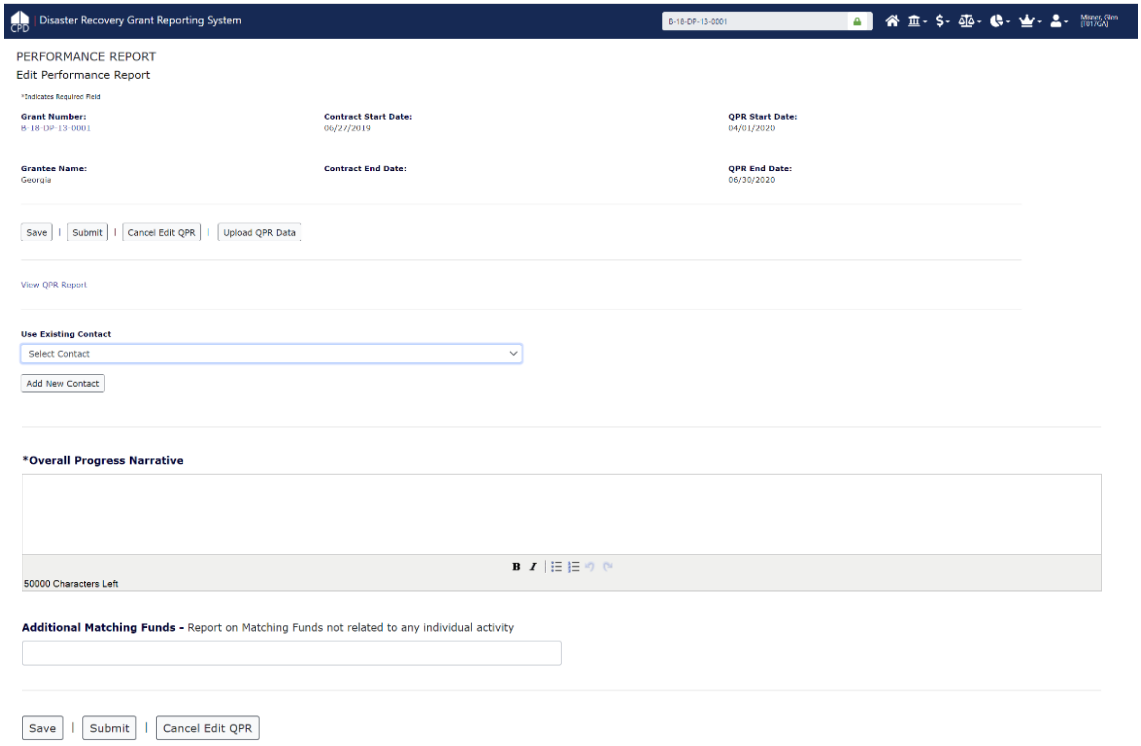
c. Grantee Submission Comments

d. SF-425 financial data

e. Activity-level accomplishment and expenditure data

User Role: Grantee Users	**Menu Option:** Manage Performance Report

See Sections E and F below for more detail on reporting on grant-level and activity-level information.



The remainder of this page intentionally left blank.

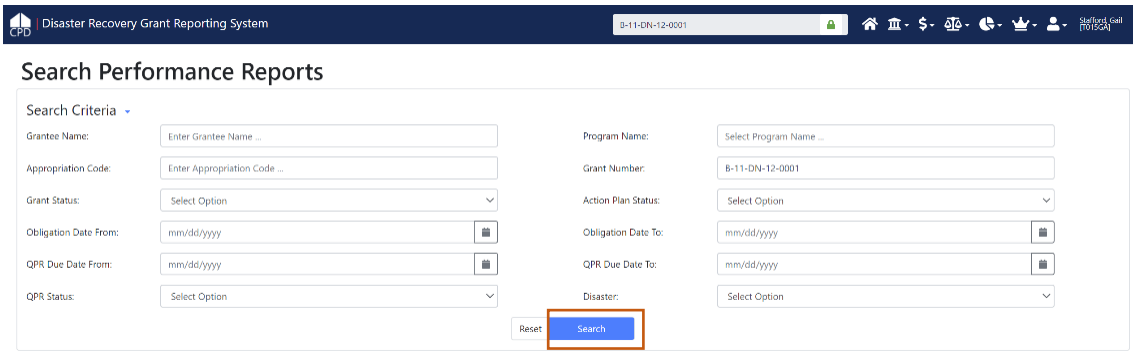
D. Search, View and Download Performance Reports

D1. Grantee and HUD | Search Performance Reports

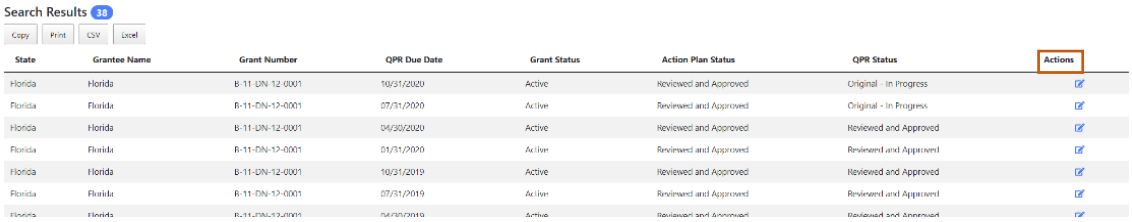
User Role: Grantee and HUD Users	**Menu Option:** Search Performance Reports
Purpose: Allow Grantee and HUD Users to search for a Performance Report.	

Complete the following steps to search for a Performance Report:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Search Performance Reports>** link. The **"Search Performance Report"** page will load. Enter search criteria and select **<Search>**. Search results will load.



2 On the **"Search Results"** page, select the icon in the "Action" column to view or edit the desired Performance Report.



The remainder of this page intentionally left blank.

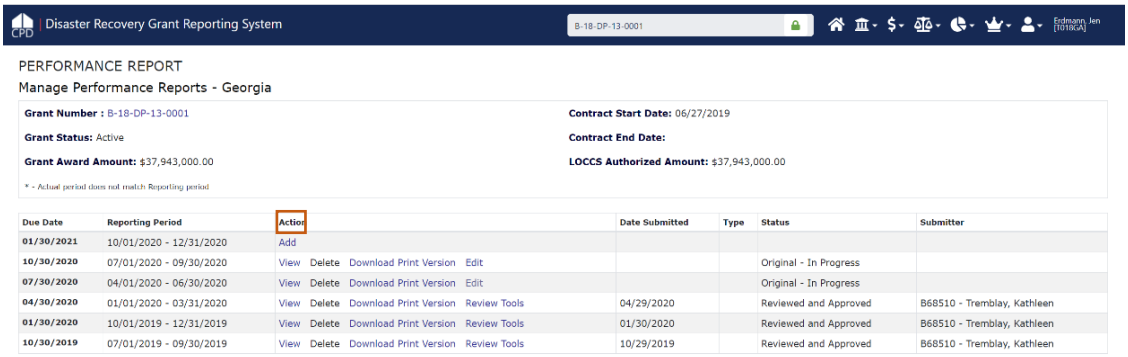
D2. Grantee and HUD | View Performance Reports

User Role: Grantee and HUD Users	**Menu Option:** Manage Performance Report

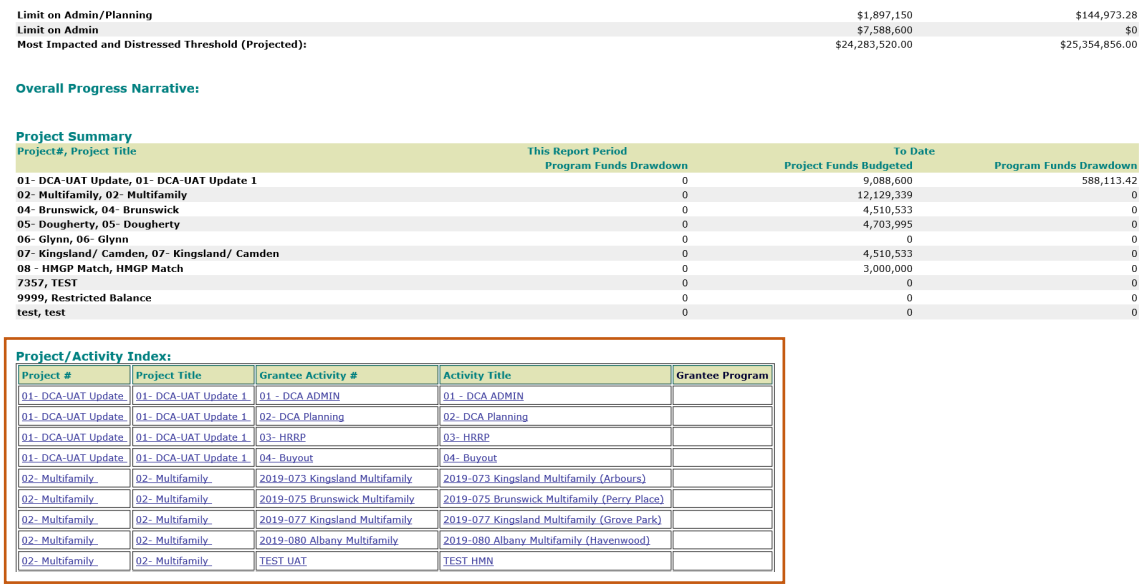
Purpose: Allow Grantee and HUD Users to view a Performance Report.

Complete the following steps to view a Performance Report:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<View>** link in the "Action" column next to the desired reporting period.



2 A new browser tab or window will open and display information relevant to the Performance Report for the selected reporting period. DRGR Users may select the hyperlinks to jump to desired activities.



Limit on Admin/Planning	$1,897,150	$144,973.28
Limit on Admin	$7,588,600	$0
Most Impacted and Distressed Threshold (Projected):	$24,283,520.00	$25,354,856.00

Overall Progress Narrative:

Project Summary

Project#, Project Title	This Report Period Program Funds Drawdown	To Date Project Funds Budgeted	To Date Program Funds Drawdown
01- DCA-UAT Update, 01- DCA-UAT Update 1	0	9,088,600	588,113.42
02- Multifamily, 02- Multifamily	0	12,129,339	0
04- Brunswick, 04- Brunswick	0	4,510,533	0
05- Dougherty, 05- Dougherty	0	4,703,995	0
06- Glynn, 06- Glynn	0	0	0
07- Kingsland/ Camden, 07- Kingsland/ Camden	0	4,510,533	0
08 - HMGP Match, HMGP Match	0	3,000,000	0
7357, TEST	0	0	0
9999, Restricted Balance	0	0	0
test, test	0	0	0

Project/Activity Index:

Project #	Project Title	Grantee Activity #	Activity Title	Grantee Program
01- DCA-UAT Update	01- DCA-UAT Update 1	01 - DCA ADMIN	01 - DCA ADMIN	
01- DCA-UAT Update	01- DCA-UAT Update 1	02- DCA Planning	02- DCA Planning	
01- DCA-UAT Update	01- DCA-UAT Update 1	03- HRRP	03- HRRP	
01- DCA-UAT Update	01- DCA-UAT Update 1	04- Buyout	04- Buyout	
02- Multifamily	02- Multifamily	2019-073 Kingsland Multifamily	2019-073 Kingsland Multifamily (Arbours)	
02- Multifamily	02- Multifamily	2019-075 Brunswick Multifamily	2019-075 Brunswick Multifamily (Perry Place)	
02- Multifamily	02- Multifamily	2019-077 Kingsland Multifamily	2019-077 Kingsland Multifamily (Grove Park)	
02- Multifamily	02- Multifamily	2019-080 Albany Multifamily	2019-080 Albany Multifamily (Havenwood)	
02- Multifamily	02- Multifamily	TEST UAT	TEST HMN	

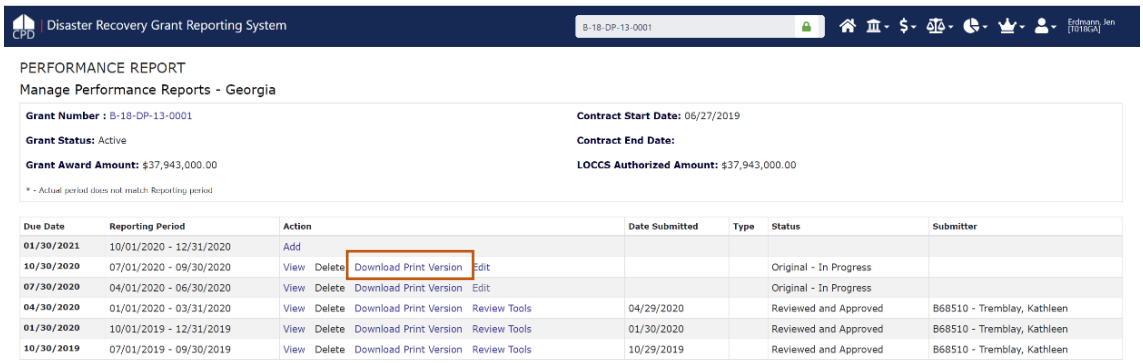
D3. Grantee and HUD | Download Performance Reports

User Role: Grantee and HUD Users	**Menu Option:** Manage Performance Report

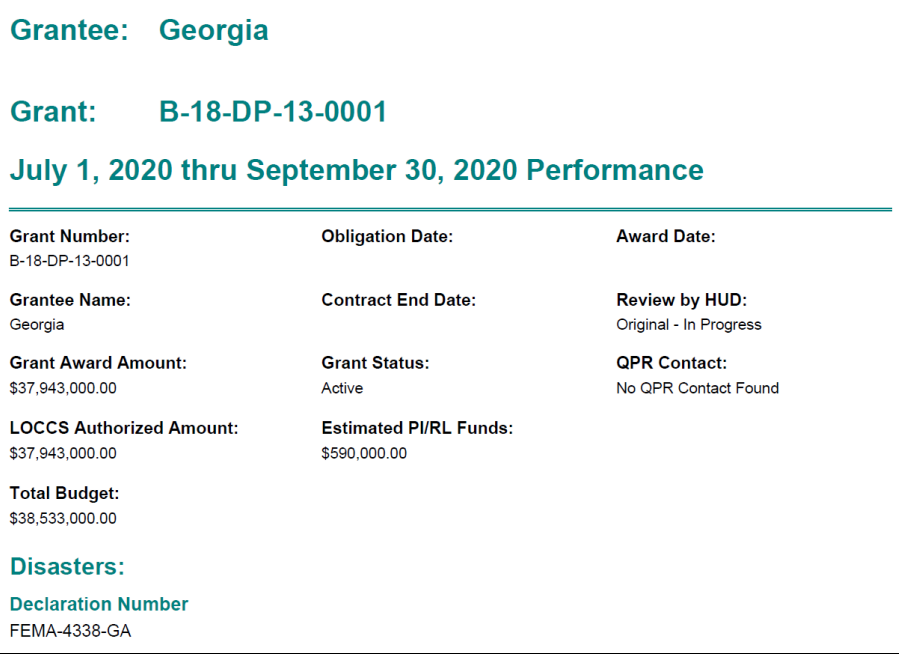
Purpose: Allow Grantee and HUD Users to download a Performance Report

Complete the following steps to download a Performance Report:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<Download Print Version>** link in the "Action" column next to the desired reporting period.



2 A new tab will open with a PDF version of the selected performance report. This file can be printed.



E. Manage Performance Report – Grant Level

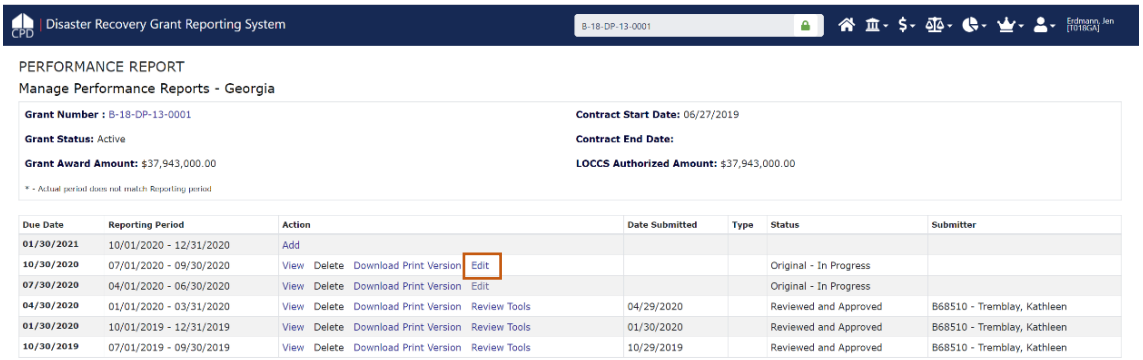
This section provides procedures for navigating the **"Edit Performance Report"** page to complete each component of grant-level information.

E1. Grantee | Select Performance Report Contact

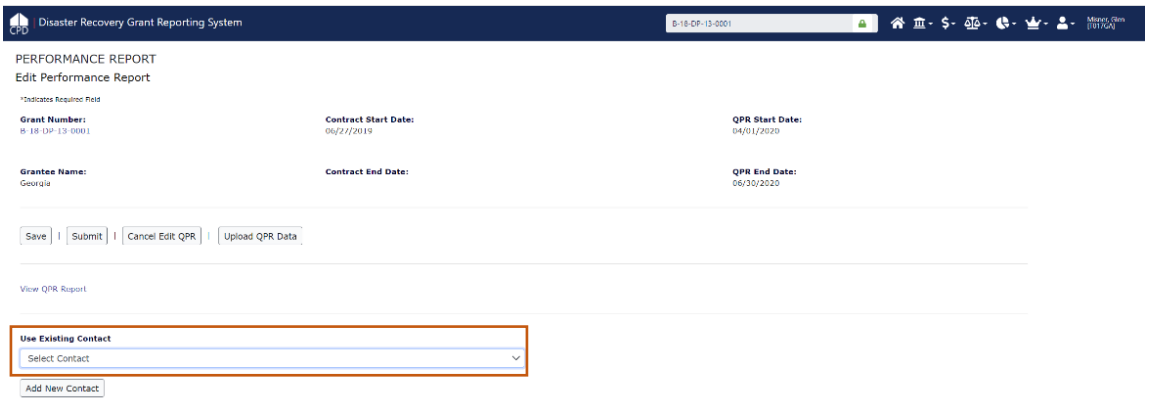
User Role: Grantee Users	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to select a Performance Report contact	

Complete the following steps to select a Performance Report contact:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.

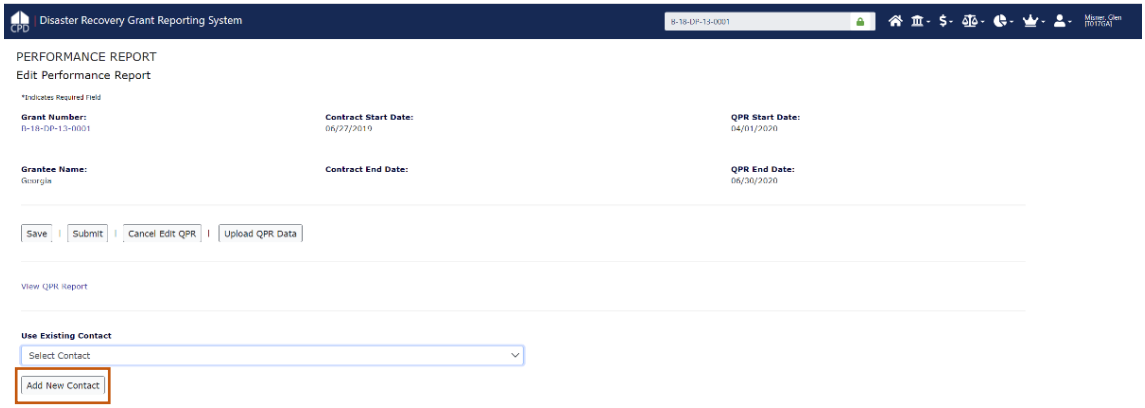


2 The **"Edit Performance Report"** page will load. Select the **<Use Existing Contact>** dropdown menu and select the desired contact displayed.

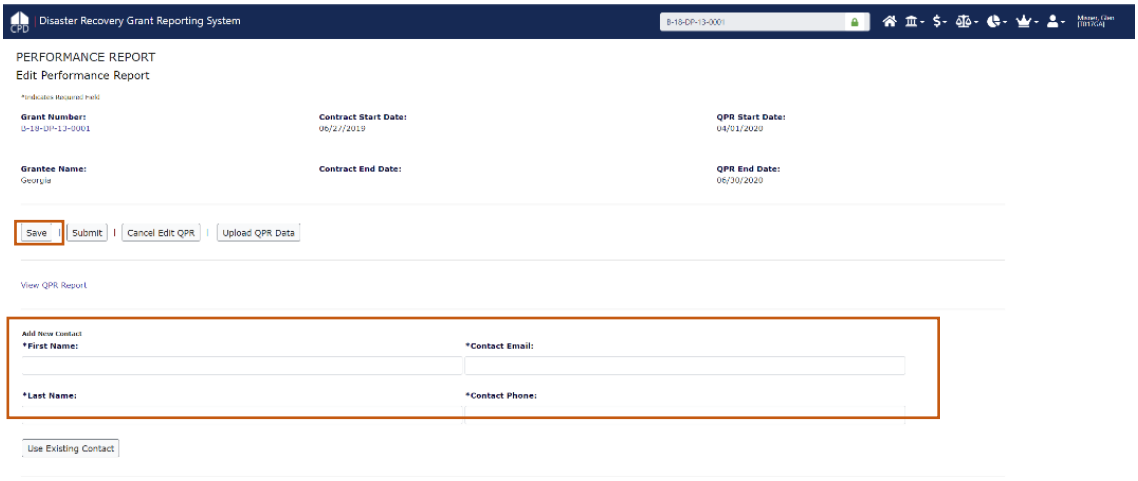


User Role: Grantee Users	**Menu Option:** Manage Performance Report

3 If the desired contact is not displayed in the "Use Existing Contact" dropdown menu, select **<Add New Contact>**.



4 Complete, at minimum, all required fields marked with an asterisk (*) and select **<Save>**.



E2. Grantee | SF-425 Report (optional)

This feature may not be available to all Grantees depending on Grant appropriation. Users should check with their HUD CPD Representative for guidance, if needed. For Grantees, who must submit an SF-425, users can submit SF-425 reports via DRGR instead of submitting the report by other methods. For more information on SF-425 Reports, review the following Fact Sheets on the HUD Exchange:

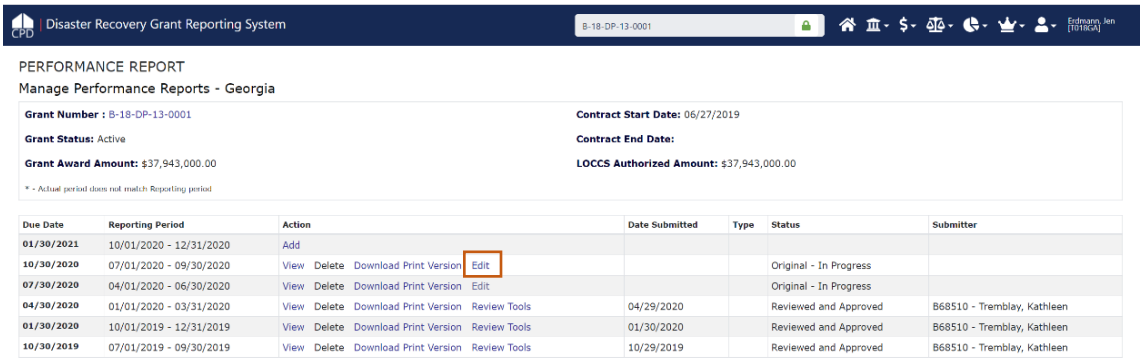
- SF-425 Report
- Changes to SF-425 Report
- SF 425 for TA Providers (updated 11/2019)

Most of the data necessary to populate the SF-425 report can be obtained from the data already collected by the DRGR System. The steps below describe how Grantees can override certain data populated by the DRGR System.

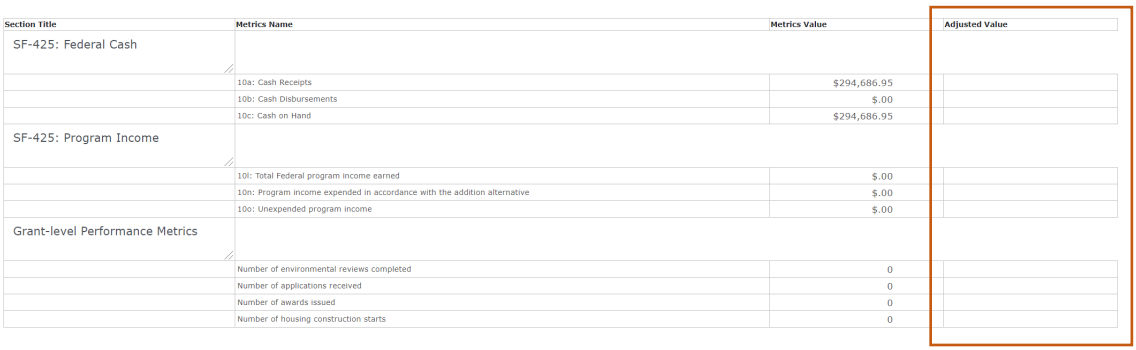
User Role: Grantee Users	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to edit overall Performance Report metrics	

Complete the following steps to edit overall Performance Report metrics:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. Select the **<Manage Performance Report>** link. See Step A1 above. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.



2 The **"Edit Performance Report"** page contains the following table. Review the information in the "Metric Value" for accuracy and completeness. To revise a "Metric Value," enter the correct value under the "Adjusted Value" column for the desired line item and select **<Save>**. The "Adjusted Value" will replace the "Metric Value".



Section Title	Metrics Name	Metrics Value	Adjusted Value
SF-425: Federal Cash			
	10a: Cash Receipts	$294,686.95	
	10b: Cash Disbursements	$.00	
	10c: Cash on Hand	$294,686.95	
SF-425: Program Income			
	10l: Total Federal program income earned	$.00	
	10n: Program income expended in accordance with the addition alternative	$.00	
	10o: Unexpended program income	$.00	
Grant-level Performance Metrics			
	Number of environmental reviews completed	0	
	Number of applications received	0	
	Number of awards issued	0	
	Number of housing construction starts	0	

3 Current and prior SF-425 reports in PDF format are retreivable from MicroStrategy (see Chapter 35 – MicroStrategy Reports for more information on using Microstrategy).

E3. Grantee | Overall Progress Narrative and Submission Comments

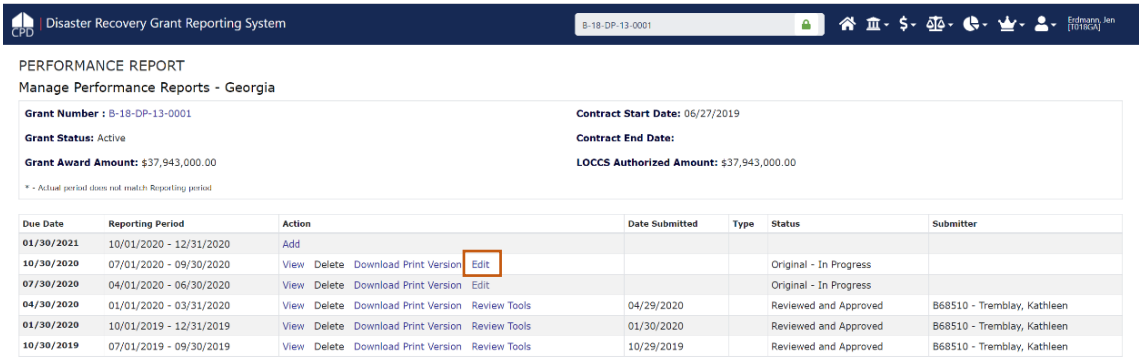
Note that the Overall Progress Narrative is required and must be saved before the System will display activities for reporting. Begin by populating the Overall Progress Narrative and saving the Performance Reports before moving on to report on activities.

TIP! Grantees may choose to enter placeholder text in the Overall Progress Narrative to get started on the Performance Report entries. This allows the Grantee to save the Performance Report, report on activities, and collect a more complete overall summary of outcomes. If using a placeholder, be sure to update the text with a true grant-level progress narrative before submission.

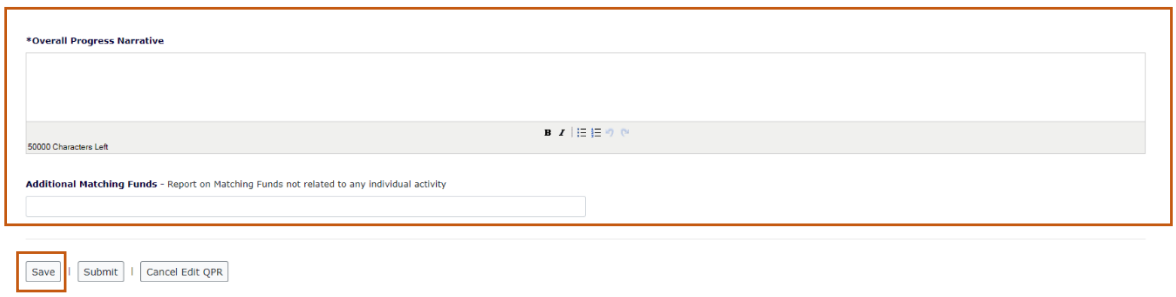
User Role: Grantee Users	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to enter Overall Progress Narrative and Submission Comments	

Complete the following steps to select a Performance Report contact:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.



2 To enter the **Overall Progress Narrative**: Scroll down to the "Overall Progress Narrative" dialogue box and enter information on overall grant-level accomplishments for the reporting period. Note that the "Overall Progress Narrative" is required to save the Performance Report. Once complete, select **<Save>.**



User Role: Grantee Users	**Menu Option:** Manage Performance Report

4 To enter the **QPR Submission Comments**: Scroll down to the "QPR Submission Comments" dialogue box and enter information to aid your CPD Representative in the review of the Performance Report. This information will not be visible by the public. Supporting documents may also be added. (See Chapter 22 – Performance Report Submission and Approval) for more information on submitting Performance Reports.

F. Manage Performance Report – Activity Level

This section provides procedures for Grantee Users to navigate the **"Edit Performance Report – Activity"** pages. It is important to note that Grantees should only report accomplishments that were completed during the reporting period. If users enter the total cumulative accomplishments for an activity in each Performance Report, the System will aggregate all reported totals and have an inaccurate and inflated accomplishment value for the activity.

TIP! Financial data, including budgets, obligations, program income receipts, and Grant fund and program fund drawdowns, but excluding expenditures and match, will be automatically generated by the DRGR System and noneditable by the Grantee.

Program Process Recommendation:

- The total accomplishments data should match across the beneficiary data (generally speaking, the cumulative "Number of Housing Units" should equal the "Number of Households" by race/ethnicity, tenure and income).
- For Grantees meeting national objectives, only report outcomes in the Performance Report if the National Objective has been met.

Beneficiaries and Accomplishments: Activities are designated as Direct Benefit or Area Benefit Activities based on the Activity Type and National Objective selected in the Action Plan:

- For Direct Benefit activities, beneficiary data will be entered on "Page 1" while accomplishment and financial data will be entered on "Page 2" of the "**Edit Performance Report – Activity"** pages.
- Area Benefit activities differ from Direct Benefit activities in that the beneficiaries of the activity are determined by the service area entered in the DRGR Action Plan. Therefore, Area Benefit activities only report on accomplishment and financial data.

Expenditures: Grantee users must enter expenditures at two levels:

- Activity expenditures, which should be equal to the amount of funds the Grantee expended that quarter, regardless of the amount drawn; and
- Most Impacted and Distressed (MID) expenditures (CDBG-DR Grantees only) for each activity that count toward the MID expenditure requirement. If an activity is exclusively available in MID areas, then the MID expenditures should equal the total Activity expenditures. If an activity is available inside and outside of MID areas, then the MID expenditures should equal the amount of funds expended in the MID areas. If an activity is not available in MID areas, then the MID expenditures should be left blank.

NOTE: Most Impacted and Distressed (MID) Budgets and Expenditures are for CDBG-DR Grants only. Other Grantees should leave these fields blank.

TIP! DRGR Data Analytics Reports P33 and P41 are the most common MicroStrategy reports used by Grantee and HUD users to review and troubleshoot accomplishment data.

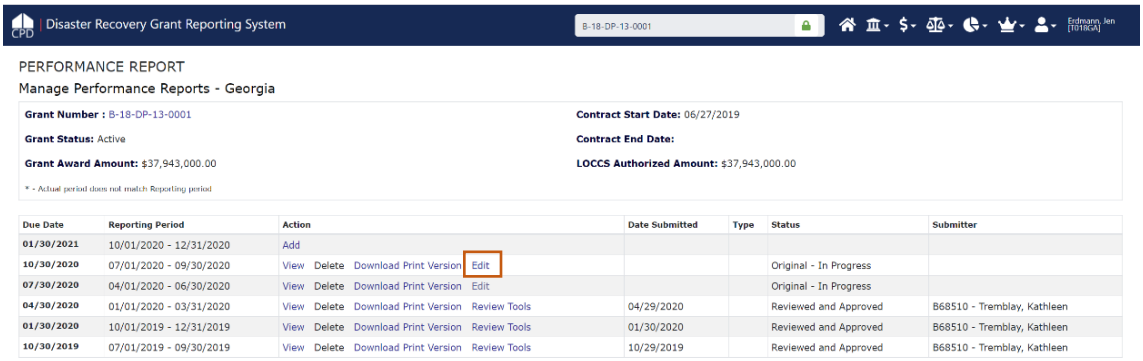
If the field for a performance measure is missing (e.g., "Number of Rental Households"), it is likely because the Grantee forgot to enter projections for that performance measure in the DRGR Action Plan. In these instances, the Grantee must edit and resubmit the Action Plan for HUD approval prior to being able to submit a Performance Report with the performance measure included (see Chapter 14 – Action Plan Activities).

F1. Grantee | Edit Performance Report – Direct Benefit Activity

User Role: Grantee Users	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to edit Performance Report for a Direct Benefit Activity	

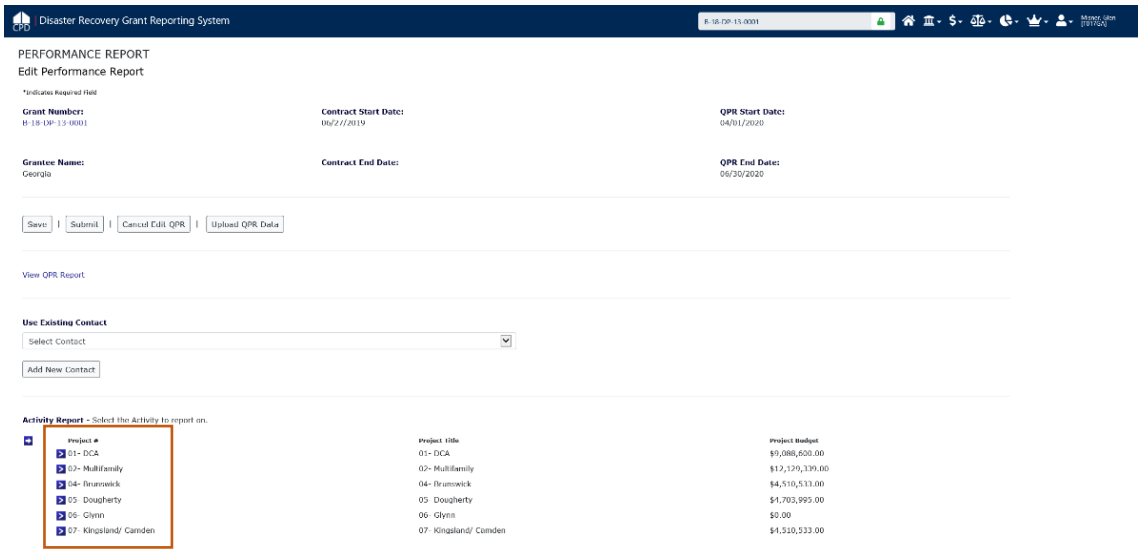
Complete the following steps to edit Performance Report for a Direct Benefit Activity:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.

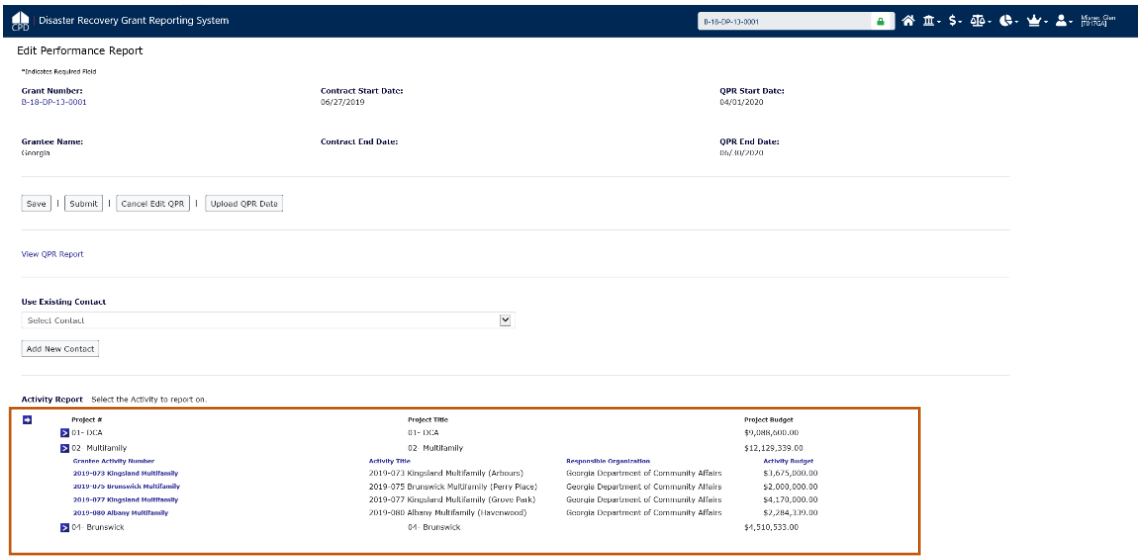


User Role: Grantee Users	**Menu Option:** Manage Performance Report

2 On the **"Edit Performance Report"** page, to edit an individual activity, select the expand icons next to each Project name and number. This will load every Activity assigned to that Project.

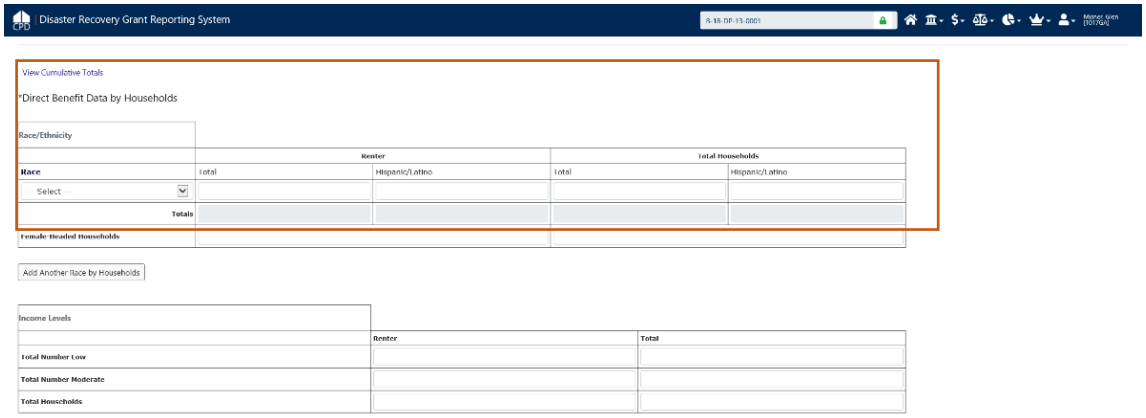


3 Select the desired **<Activity>** hyperlink in blue text from the list that appears. The **"Edit Performance Report – Activity Page 1"** page will load.

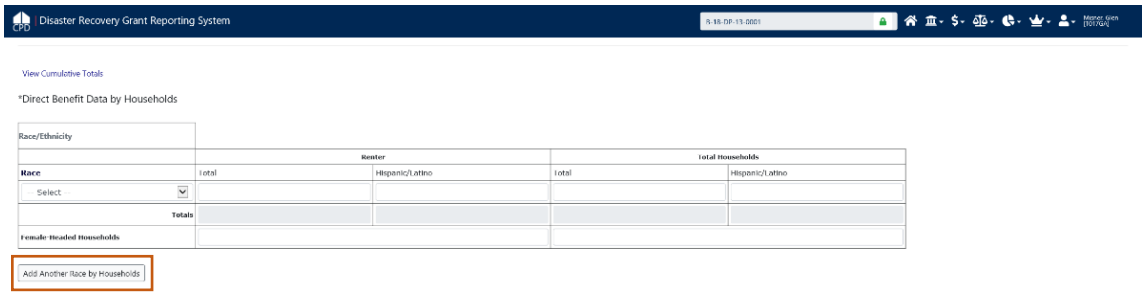


4 Enter "Race/Ethnicity" data selecting the appropriate racial category from the **<Race>** dropdown menu followed by entering the numeric value in the "Household" fields. Values must also be entered for any households that are 'Hispanic/Latino' in the respective fields.

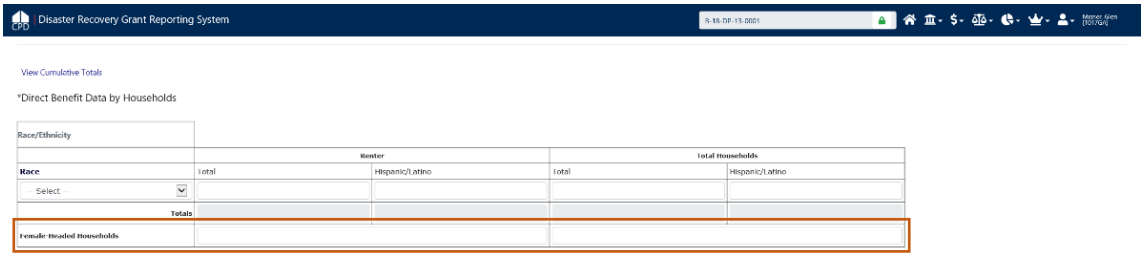
NOTE: Values should be aggregated. So for instance, if a Grantee wants to report two (2) White, low-income households and one (1) White moderate-income household that is also hispanic, then the Grantee will add just one line for White race and in it report three (3) Total households with one (1) Hispanic/Latino.



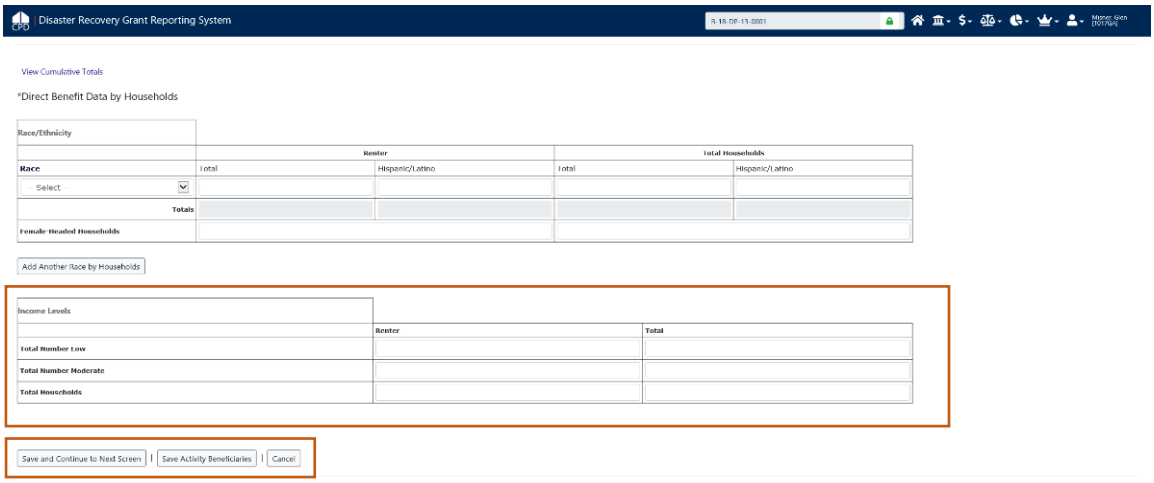
5 Select **<Add another Race by Household>** to add another racial category line item.



6 Enter aggregate values for "Female Headed Households" in the appropriate fields.

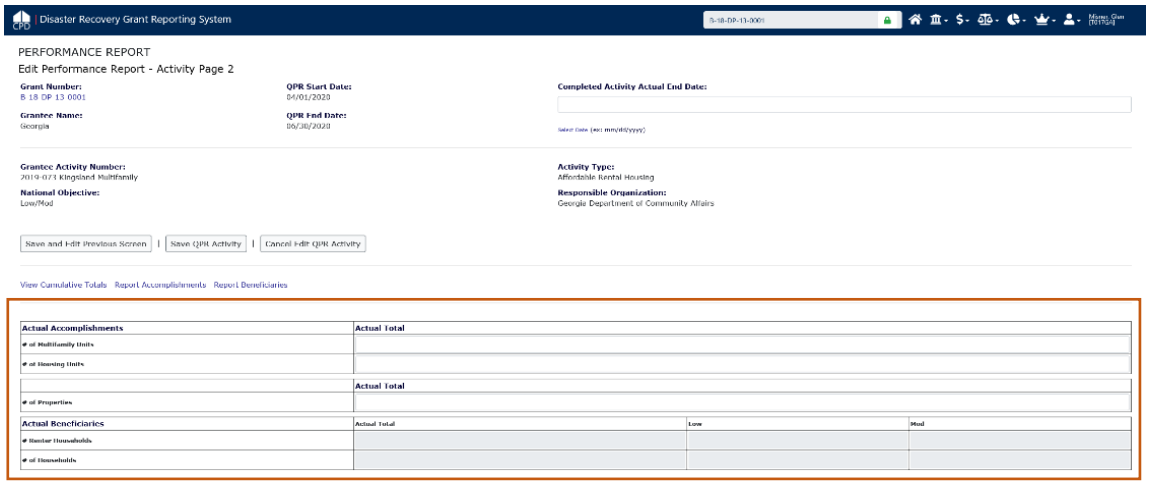


7 Enter "Income Levels" data in the appropriate fields. The total values entered for "Race/Ethnicity" must match the total values entered in "Income Levels" in order to move to the next page. So for instance, if three (3) households have been entered under the race data section, then three (3) households must be entered in the income data section. Failure to match these values will result in an error message.

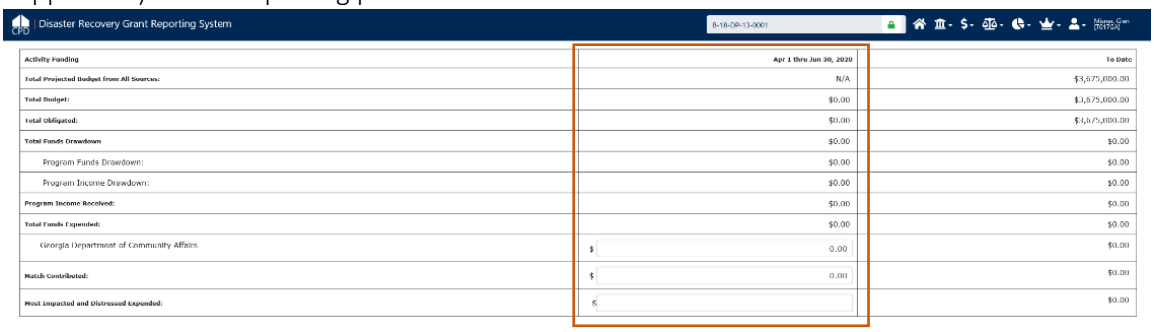


When complete, select **<Save and Continue to Next Screen>** to load the **"Edit Performance Report – Page 2"** page. Users can also select **<Save Activity Beneficiaries>** to save the information entered and return to the **"Edit Performance Report"** page.

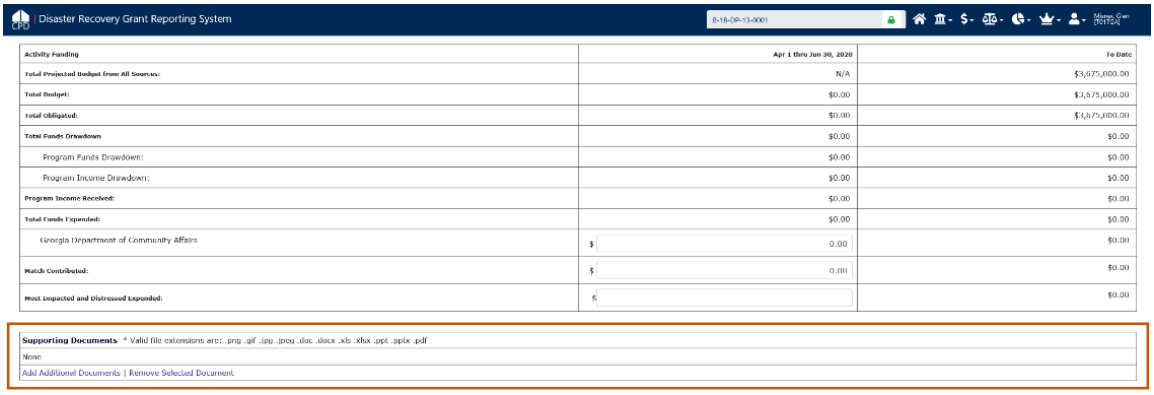
8 On the **"Edit Performance Report – Page 2"** page, enter "Actual Accomplishments." The "Actual Beneficiaries" will be pre-popuated with data from **"Edit Performance Report – Activity Page 1"**.



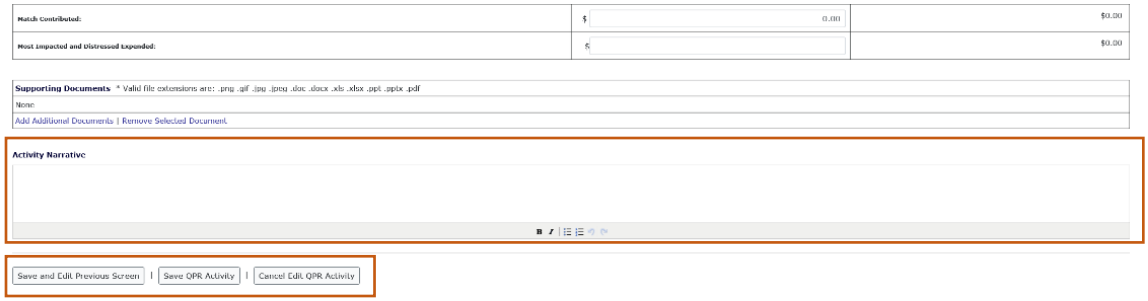
9 Review the pre-populated financial data for accuracy and enter the "Total Funds Expended", "Match Contribution" (as applicable), and "Most Impacted and Distressed Expenditures (MID)" (as applicable) for the reporting period.



10 Users have the option of attaching documents and images as supporting information for the activity (e.g. a photo of completed housing rehabilitation) by selecting the **<Add Additional Documents>** link in the "Supporting Documents" section.



11 Enter a narrative describing the progress and status of the activity in the "Activity Narrative" dialogue box. When complete, select **<Save QPR Activity>** to save all entered information. The **<Save and Edit Previous Screen>** option allows users to return to the **"Edit Performance Report – Activity Page 1"** page. The **<Cancel Edit QPR Activity>** option cancels the information entered and returns the user to the **"Edit Performance Report"** page with no changes.



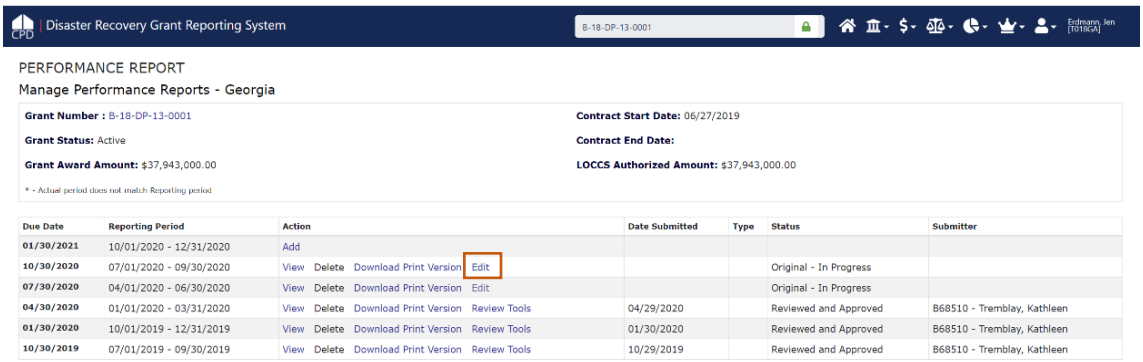
F2. Grantee | Edit Performance Report – Area Benefit Activity

User Role: Grantee Users	**Menu Option:** Manage Performance Report

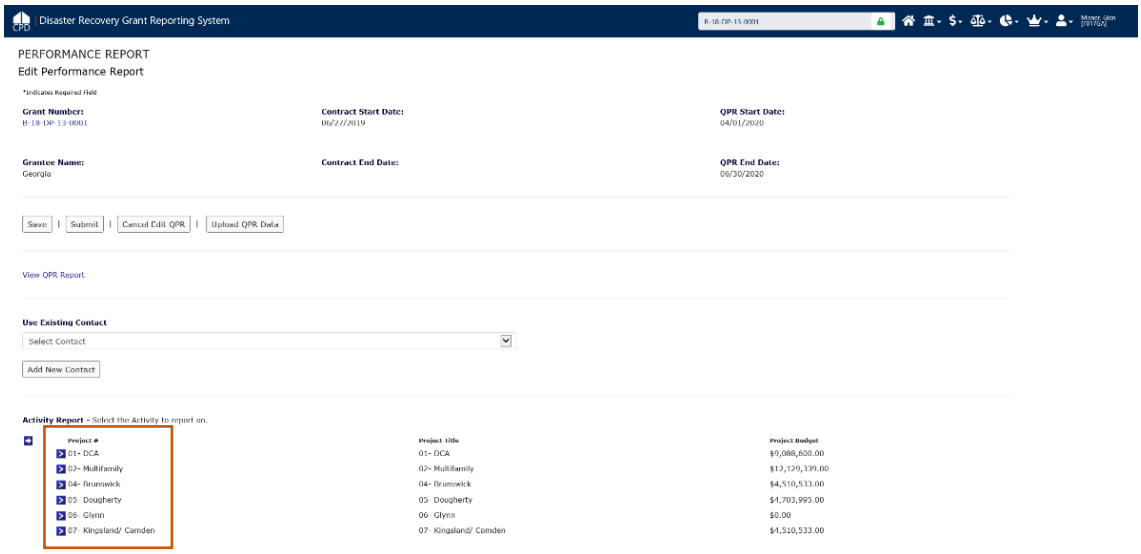
Purpose: Allow Grantee Users to edit Performance Report for an Area Benefit Activity

Complete the following steps to edit Performance Report for an Area Benefit Activity:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. Select the **<Manage Performance Report>** link. See Step A1 above. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.

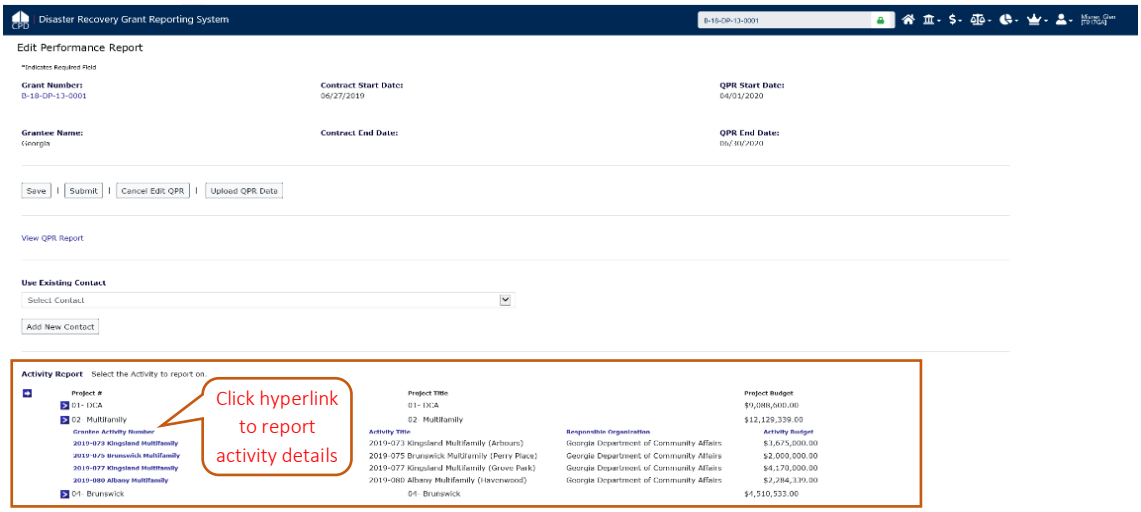


2 On the **"Edit Performance Report"** page, to edit an individual activity, select the expand icons next to each Project name and number. This will load every Activity assigned to that Project.

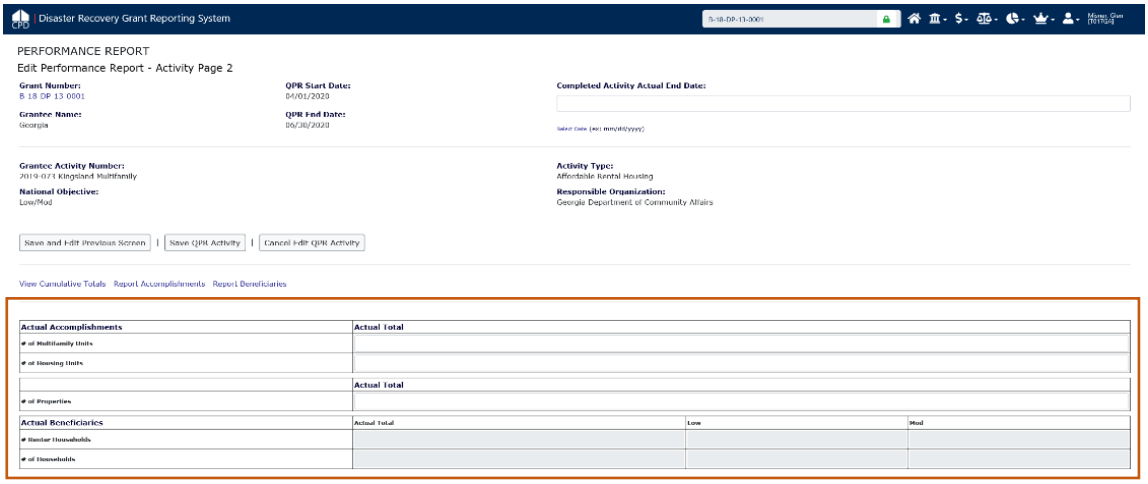


3 Select the desired **<Activity>** hyperlink in blue text from the list that appears. The **"Edit Performance Report – Activity Page 1"** page will load.

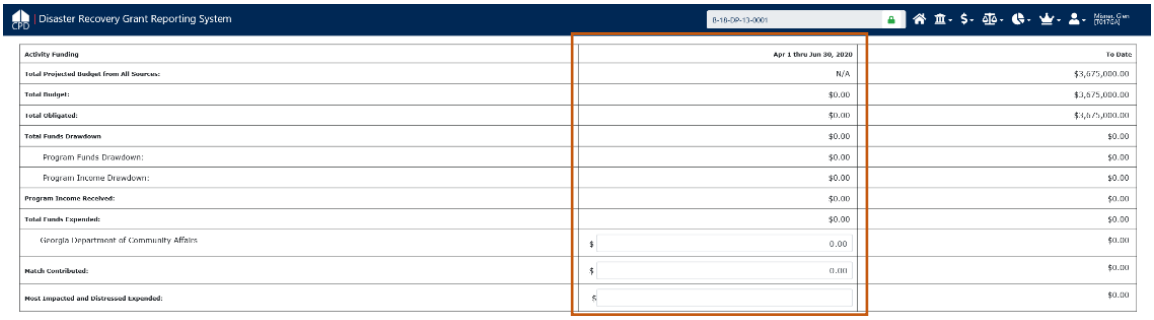
User Role: Grantee Users	**Menu Option:** Manage Performance Report



4 On the **"Edit Performance Report – Page 2"** page, enter "Actual Accomplishments." The "Actual Beneficiaries" will be pre-popuated with data from **"Edit Performance Report – Activity Page 1."**



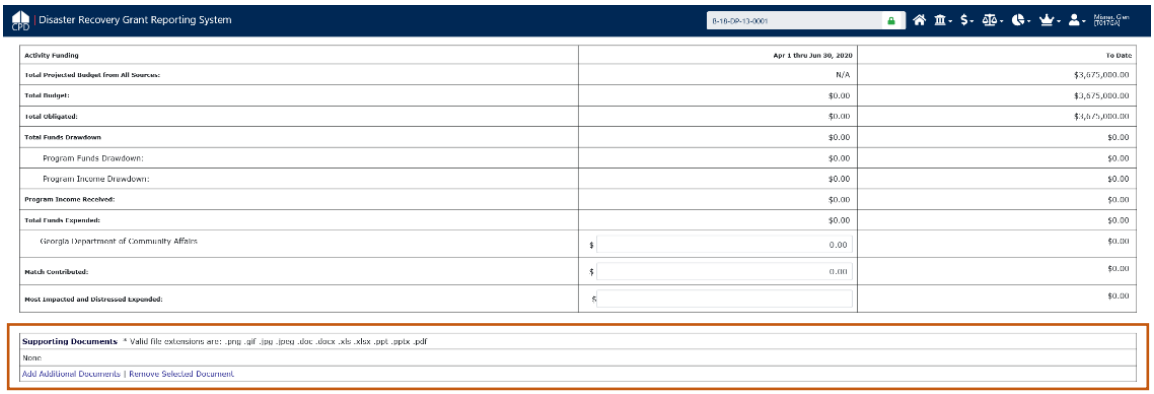
5 Review the pre-populated financial data for accuracy and enter the "Total Funds Expended", "Match Contribution" (as applicable), and "Most Impacted and Distressed Expenditures (MID)" (as applicable) for the reporting period. For Grantee users associated with a technica assistance



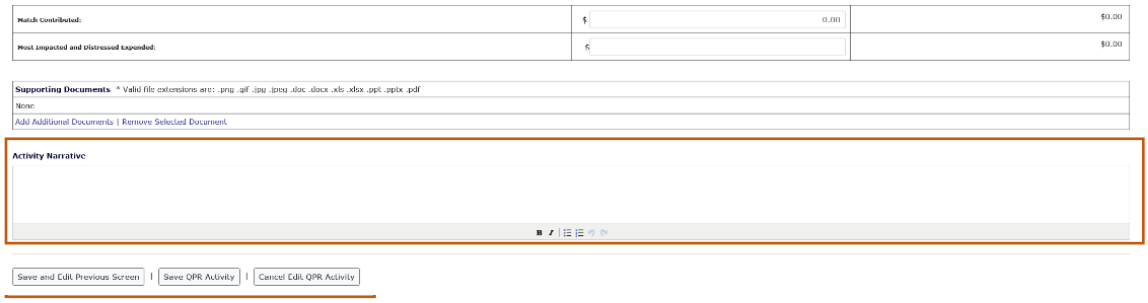
User Role: Grantee Users	**Menu Option:** Manage Performance Report

provider, the "Total Funds Expended" is pre-populated based on the drawdown amount for the quarter.

6 Users have the option of attaching documents and images as supporting information for the activity (e.g. a photo of completed housing rehabilitation) by selecting the **<Add Additional Documents>** link in the "Supporting Documents" section.



7 Enter a narrative describing the progress and status of the activity in the "Activity Narrative" dialogue box. When complete, select **<Save QPR Activity>** to save all entered information. The **<Save and Edit Previous Screen>** option allows users to return to the **"Edit Performance Report – Activity Page 1"** page. The **<Cancel Edit QPR Activity>** option cancels the information entered and returns the user to the **"Edit Performance Report"** page with no changes.



F3. Grantee | Edit Performance Report – Prior Period Corrections

DRGR should always match the Grantee's local records. In some instances, Grantees will need to remove accomplishments previously reported in prior Performance Reports (e.g., due to data entry error) to correct over-reporting. In those instances, Grantees may use negative numbers in the current Performance Report to reduce the cumulative total to match actual, correct local records for accomplishments and expenditures. Grantees may also need to add data on accomplishments that were omitted erroneously in previous reports to bring cumulative totals to the correct value. Grantees will never open a previous Performance Report to make corrections. All corrections are made in the current Performance Report.

The following tool can provide assistance in instances where Grantees need to make significant and/or complicated changes to existing data reported in prior Performance Reports.

TIP! All Performance Report corrections to cumulative accomplishments should be made in the current reporting period!

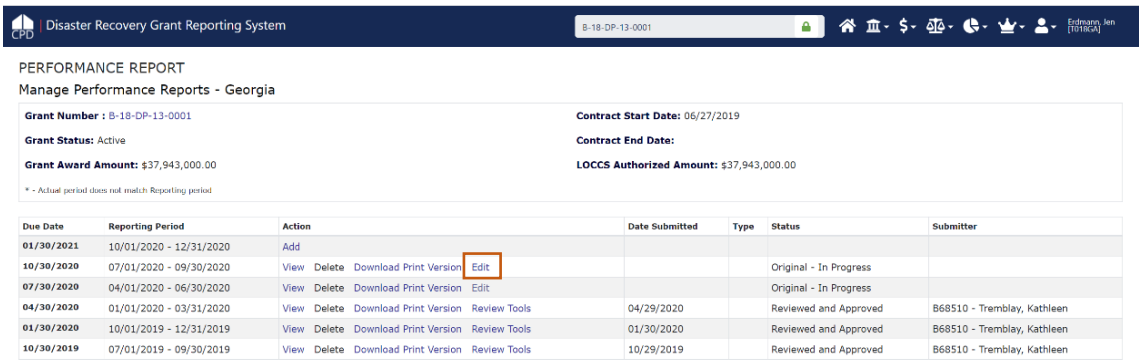
Grantees may use negative values to remove accomplishment and financial data that was over-reported. Grantees may also report on accomplishments from previous periods that had been omitted erroneously.

User Role: Grantee Users	**Menu Option:** Manage Performance Report

Purpose: Allow Grantee Users to utilize the Prior Period Correction tool to correct data entered in prior Performance Reports.

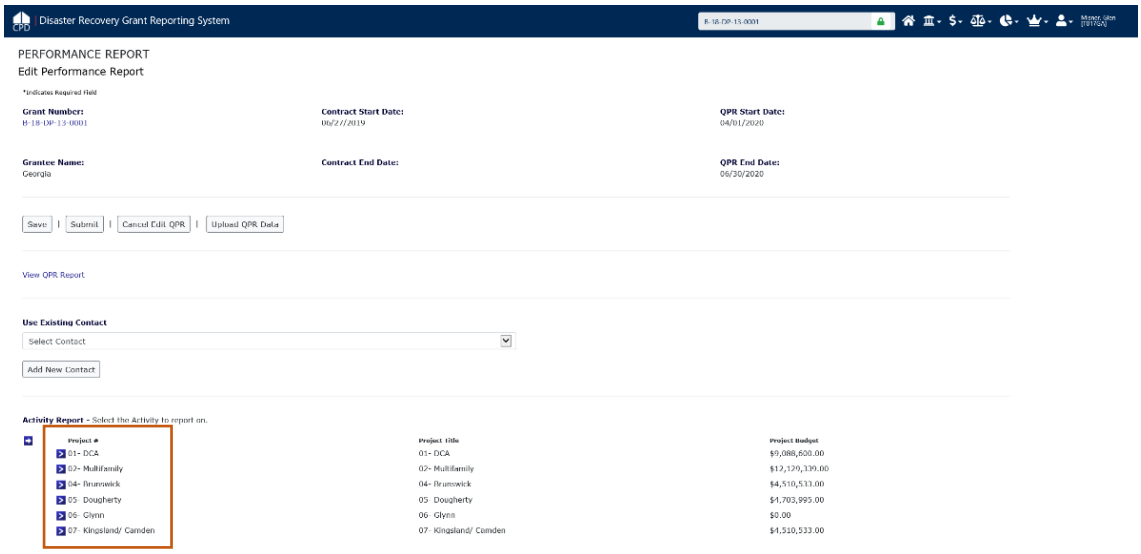
Complete the following steps to complete the Prior Period Correction Tool:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. Select the **<Manage Performance Report>** link. See Step A1 above. The **"Manage Performance Report"** page will load. Select the **<Edit>** link in the "Action" column next to the desired reporting period. The **"Edit Performance Report"** page will load.

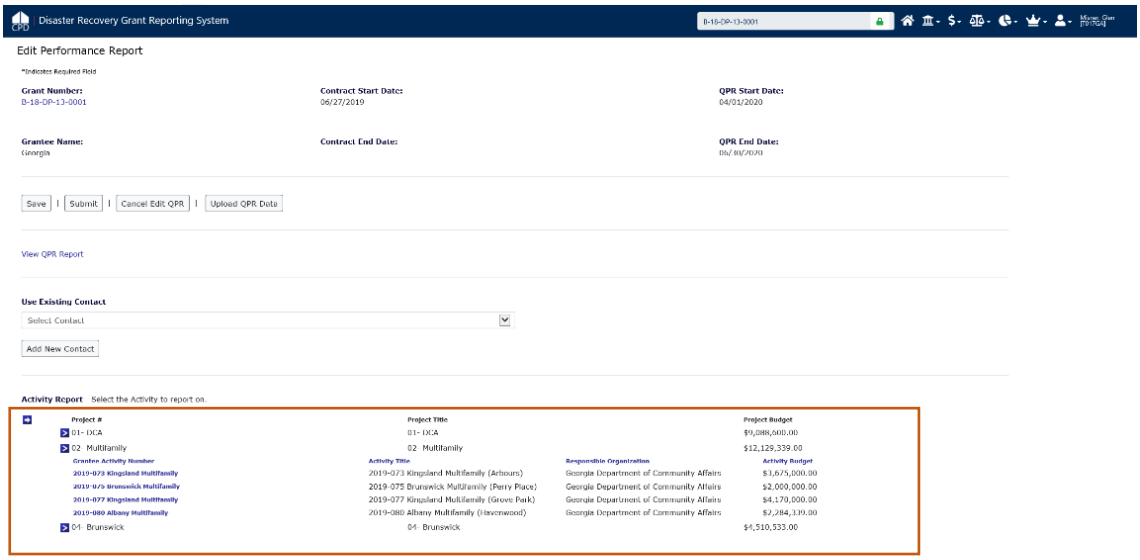


User Role: Grantee Users	**Menu Option:** Manage Performance Report

2 On the **"Edit Performance Report"** page, to edit an individual activity, select the expand icons next to each Project name and number. This will load every Activity assigned to that Project.

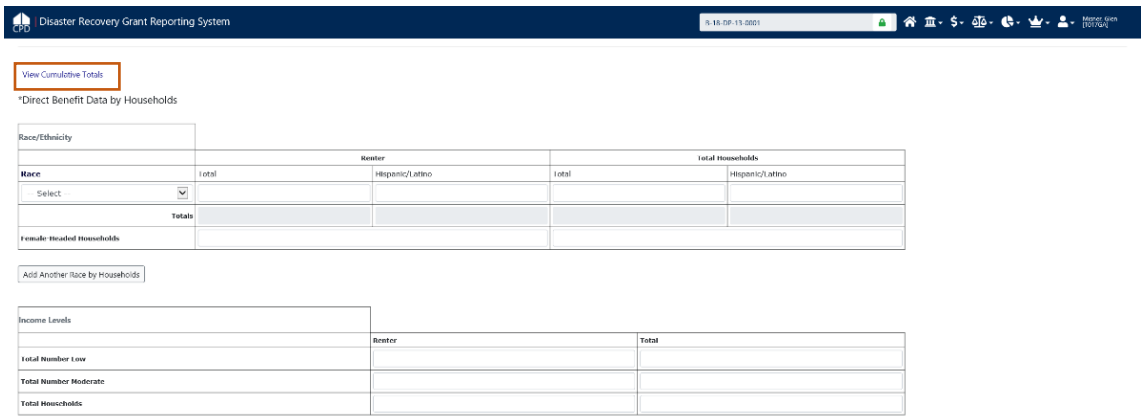


3 Select the desired Activity from the list that appears. The **"Edit Performance Report – Activity Page 1"** page will load.

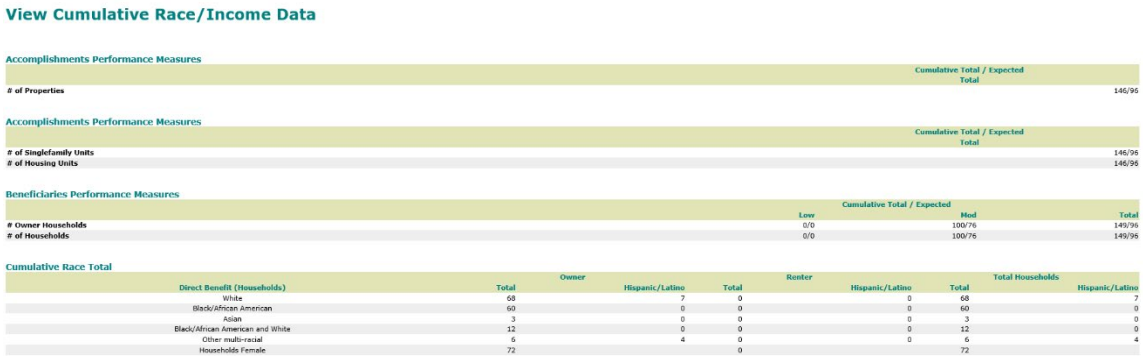


User Role: Grantee Users	**Menu Option:** Manage Performance Report

4 Select the **<View Cumulative Totals>** link.



5 The **<View Cumulative Totals>** link loads a new browser tab or page showing all cumulative accomplishments entered for the activity to-date.



View Cumulative Race/Income Data

Accomplishments Performance Measures

	Cumulative Total / Expected Total
# of Properties	146/96

Accomplishments Performance Measures

	Cumulative Total / Expected Total
# of Singlefamily Units	146/96
# of Housing Units	146/96

Beneficiaries Performance Measures

	Cumulative Total / Expected		
	Low	Mod	Total
# Owner Households	0/0	100/76	149/96
# of Households	0/0	100/76	149/96

Cumulative Race Total

	Owner		Renter		Total Households	
Direct Benefit (Households)	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino
White	68	7	0	0	68	7
Black/African American	60	0	0	0	60	0
Asian	3	0	0	0	3	0
Black/African American and White	12	0	0	0	12	0
Other multi-racial	6	4	0	0	6	4
Households Female	72		0		72	

6 On the Prior Period Corrections Tool, which can be found at the link below, enter the actual correct data that DRGR should show (the data from the Grantee's local records) in "Step 1." Enter the data collected in Step 5 **"View Cummuative Total"** page into "Step 2" of the spreadsheet. The data that must be entered into the current Performance Report in order for DRGR to reflect the Grantee's local records will be auto-populated in "Step 3" of the spreadsheet.

Prior Period Corrections Tool: https://www.hudexchange.info/resource/127/drgr-direct-benefit-data-entering-prior-period-corrections-for-breakout/

User Role: Grantee Users	**Menu Option:** Manage Performance Report

Step 1. Identify and enter totals from grantee's own data tracking

HOUSEHOLDS	Rent	Own	Total		HOUSING UNITS	
Low Income		29	29		SF	146
Moderate Income		117	117		MF	
TOTAL		146	146		TOTAL	146

HOUSEHOLDS	Rent		Own		Total	
	Total	Hisp	Total	Hisp	Total	Hisp
White			119	40	119	40
Black/ African American			12	1	12	1
Asian			4		4	
American Indian / Alaska Native						
Native Hawaiian/ Other Pacific Islander			1		1	
Asian & White			8	1	8	1
American Indian / Alaska Native & White						
Native Hawaiian/ Other Pacific Islander & White						
Black/ African American & White			2		2	
American Indian / Alaska Native & Black/African American						
TOTAL	0	0	146	42	146	42
Female Headed Households			27		27	

Step 2. Identify data already in DRGR
(Use last approved QPR for cumulative totals)

Rent	Own	Total		HOUSING UNITS	
	29	29		SF	0
	106	106		MF	
	135	135		TOTAL	135

Rent		Own		Total	
Total	Hisp	Total	Hisp	Total	Hisp
		29		29	

Step 3. Automatically sums totals for grantee to enter into current QPR
(combines in-quarter data and prior period corrections)

Rent	Own	Total		HOUSING UNITS	
0	0	0		SF	146
0	11	11		MF	0
0	11	11		TOTAL	11

Rent		Own		Total	
Total	Hisp	Total	Hisp	Total	Hisp
0	0	119	40	119	40
0	0	12	1	12	1
0	0	4	0	4	0
0	0	0	0	0	0
0	0	1	0	1	0
0	0	8	1	8	1
0	0	0	0	0	0
0	0	0	0	0	0
0	0	2	0	2	0
0	0	0	0	0	0
0	0	146	42	146	42
0		-2		-2	

7 Follow the steps in "**F1 Edit Performance Report – Direct Benefit Activity**" to enter the data autopiloted in "Step 3" of the Prior Period Correction Tool. Return to Step 4 and 5 above to view the **<View Cumulative Totals>** link again to see if the cumulative totals are now accurate.

Chapter 20: Add Addresses | Manage My Grants Module

Chapter 20: Add Addresses | Manage My Grants Module 1

A. Manage My Grants Module Access 1

Grantee | User Access 1

B. Manage Addresses 2

B1. Grantee | Add Address 2

B2. Grantee | Search/Edit Address 4

B3. Grantee | Move Address 6

B4. Grantee | Delete Address 7

B5. Grantee | Validate Address 9

B6. Grantee | Enter Support Data 10

Chapter 20: Add Addresses | Manage My Grants Module

This Chapter describes how Grantee Users may add, search/edit, move, delete, validate, and enter support data for addresses. Managing addresses in DRGR is completed in the **<Manage Performance Report>** function under the **Performance Reports** menu of the **Manage My Grants** module, but adding addresses is not always required for every appropriation, for example appropriations associated with a technical assistance provider do not use this function. Check with your CPD Representative if you are unsure whether addressees are required to be entered for your Grant.

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

Grantee Users

Menu Option	Subsection	Action
Manage Addresses	B	Add, edit, move, and delete addresses

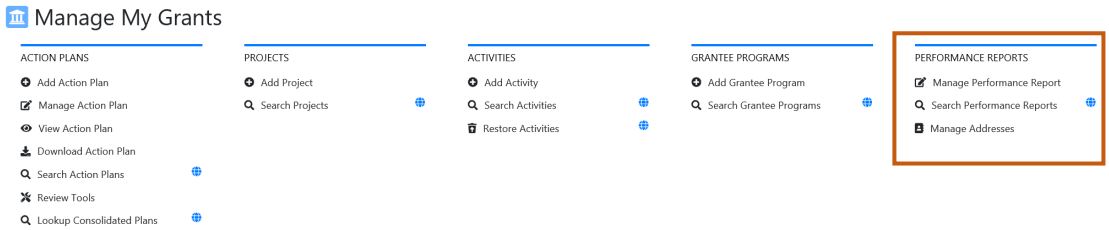
A. Manage My Grants Module Access

The **Manage My Grants** module contains access to Performance Report actions.

Grantee | User Access

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Performance Report actions.	
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 up the dropdown menu for the **Manage My Grants** module. The DRGR System displays the relevant menu items based on user type and user roles.



B. Manage Addresses

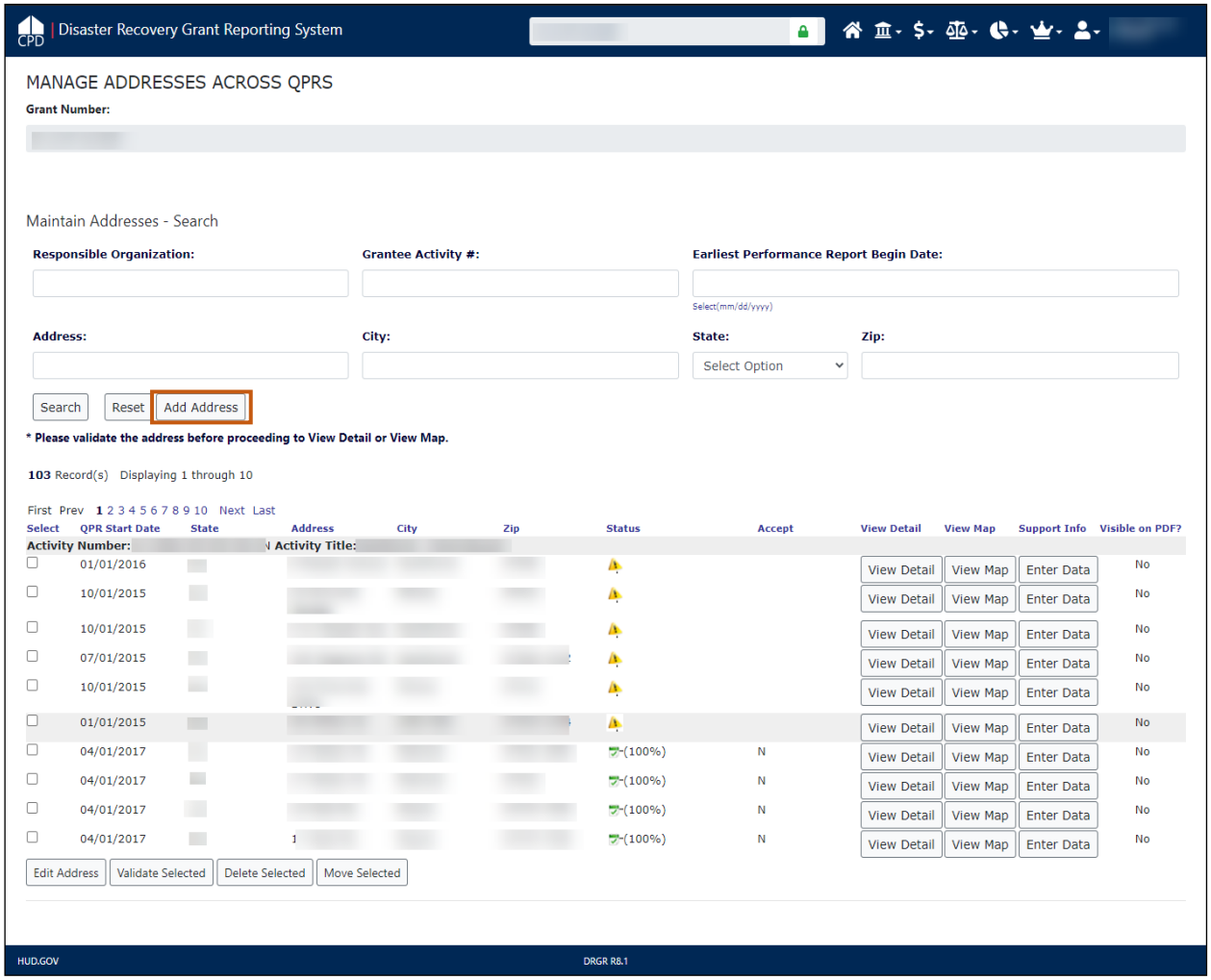
This function allows the Grantee Users to add, search/edit, move, delete, validate, and enter support data for addresses.

B1. Grantee | Add Address

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses
Purpose: Allow Grantee Users to add addresses in the performance report.	
Complete the following steps to add addresses to performance reports:	
1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Addresses>** link. The **"Manages Addresses Across QPRs "** page will load. Select the **<Add Address>** link. The **"Add Address"** page will load.	TIP! Addresses can be entered on the 'Edit Activity' screen. However, address data can also be added, deleted and moved across performance reports regardless of performance report status from the 'Add/Edit QPRs' screen. When addresses are added or managed from this screen, performance reports are not required to be submitted or approved again.

The remainder of this page intentionally left blank.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

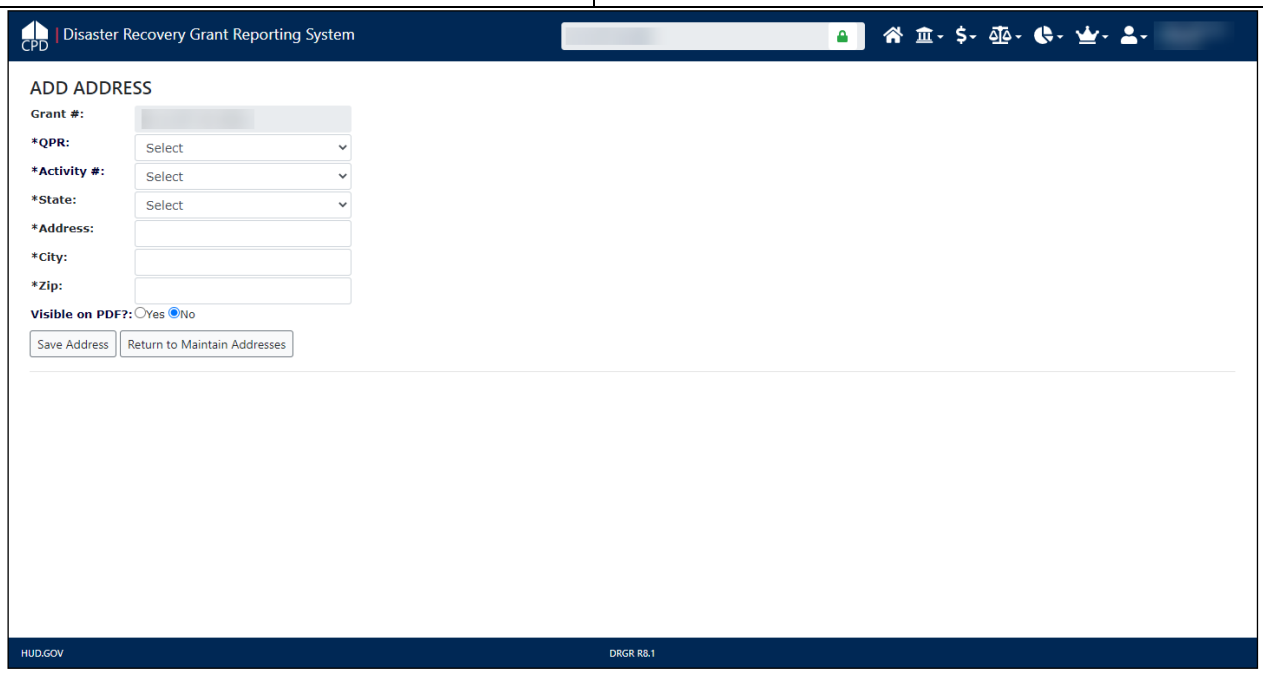


2 Enter all address information on the **"Add Address"** page. Because this add address method is used across performance reports, the user must specify the performance report period and 'Activity #', in addition to entering address information.

> TIP! For residential addresses, always choose "No" for the "Visible on PDF?" question to avoid showing the address on the printed or downloaded PDF to protect the privacy of beneficiaries.

Select **<Save Address>** to save the new address. Once the address is saved, users can select saved addresses and **<Edit>**, **<Validate>**, **<Delete>**, **<Move>** and manage addresses using the options on the **"Maintain Addresses Across QPRs"** page. See steps B2 – B6 below for managing addresses after adding the applicable addresses.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses



B2. Grantee | Search/Edit Address

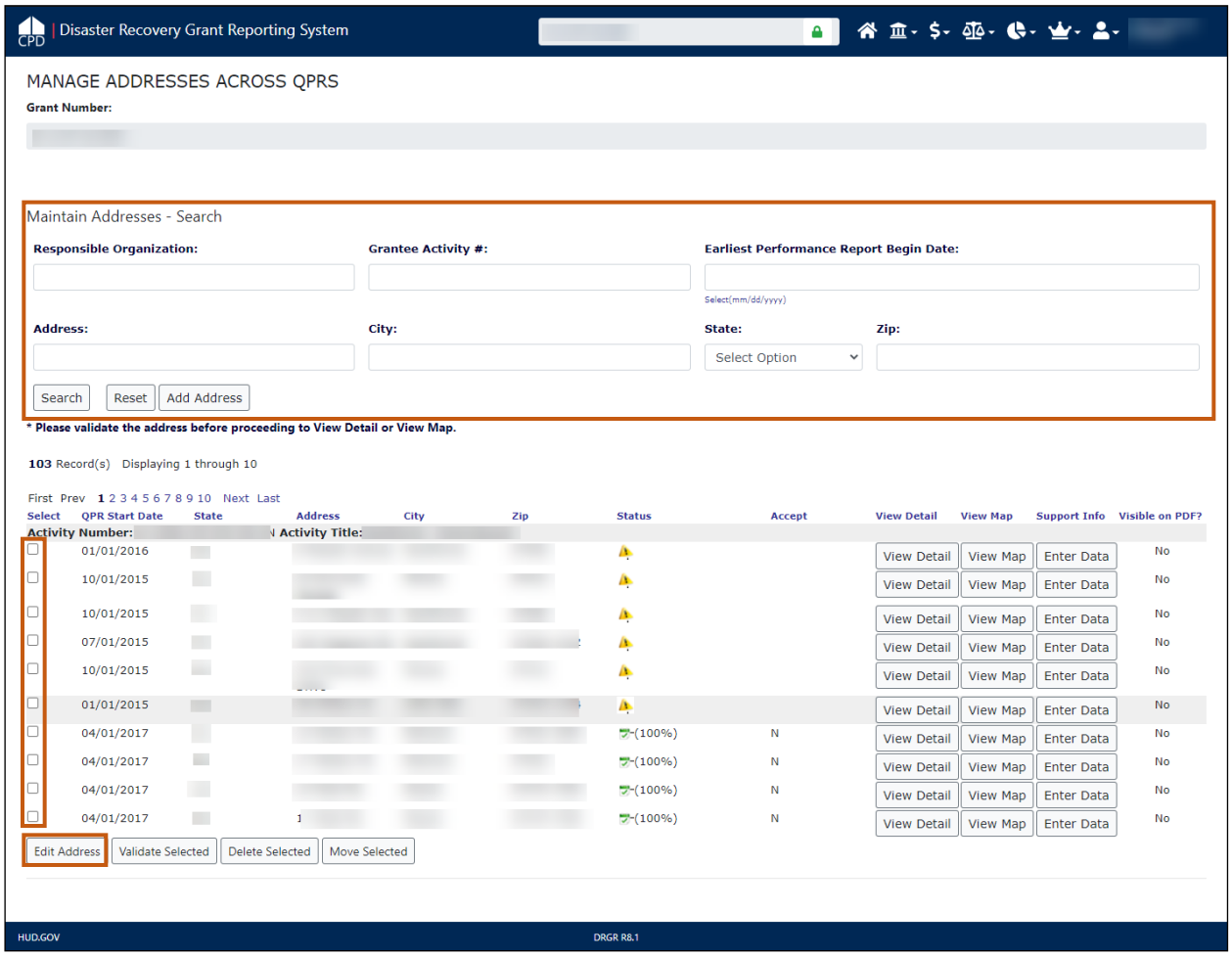
User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

Purpose: Allow Grantee Users to search and edit addresses in the performance report.

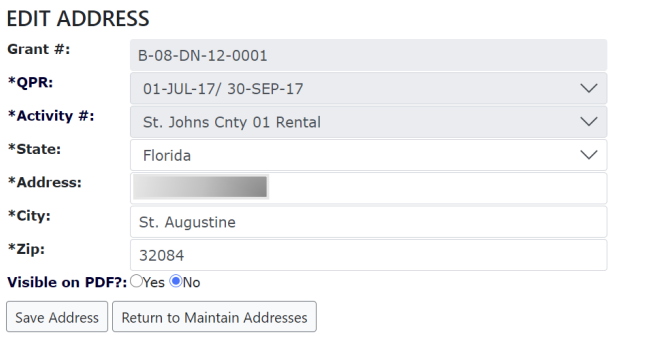
Complete the following steps to search for and edit addresses:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Addresses>** link. The **"Manages Addresses Across QPRs"** page will load. The **Maintain Address – Search** function is located at the top of the page. Enter search criteria and select **<Search.>** Results will load. Select the address to be edited and then select **<Edit Address.>** The "**Edit Address"** page loads.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses



2 On the **"Edit Address"** page, the Grantee user can modify the existing address data use the dropdown fields or the fillable fields. Select **<Save>** to record the changes. Select **<Return to Maintain Addresses>** to return to the search field.



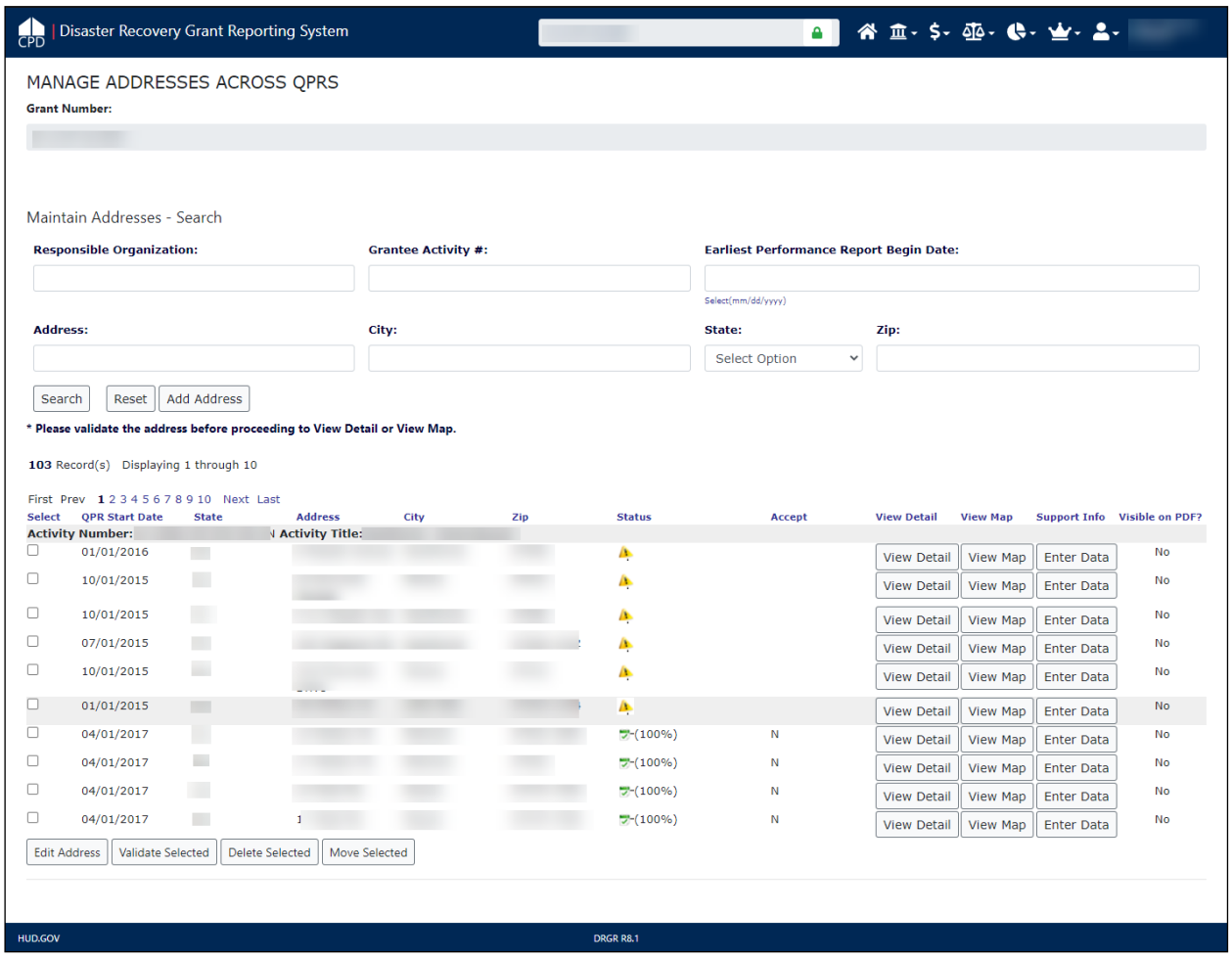
B3. Grantee | Move Address

The **<Manage Addresses>** function allows addresses to be moved from one performance report period to another. This may be useful to make corrections for an address entry without entering a duplicate address for an activity.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses
Purpose: Allow Grantee Users to move addresses across reporting periods in the performance reports.	

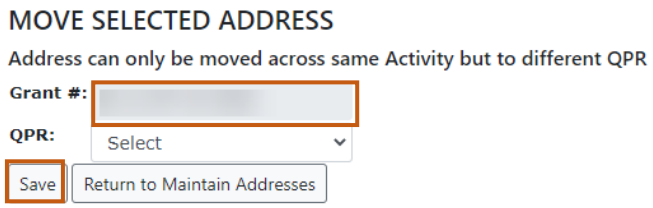
Complete the following steps to move addresses across performance report periods:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Addresses>** link. The **"Manages Addresses Across QPRs"** page will load. Search for the address to be moved by using the search steps described in Section B2 above. Results will load. Select the address to be edited and then select **<Move Selected>** to move the address to a different reporting period. The **"Move Selected Address"** page loads.



User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

2 On the **"Move Selected Address"** page, select a **QPR** (to identify where to move the address to) from the dropdown list. Select **<Save>**.



B4. Grantee | Delete Address

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

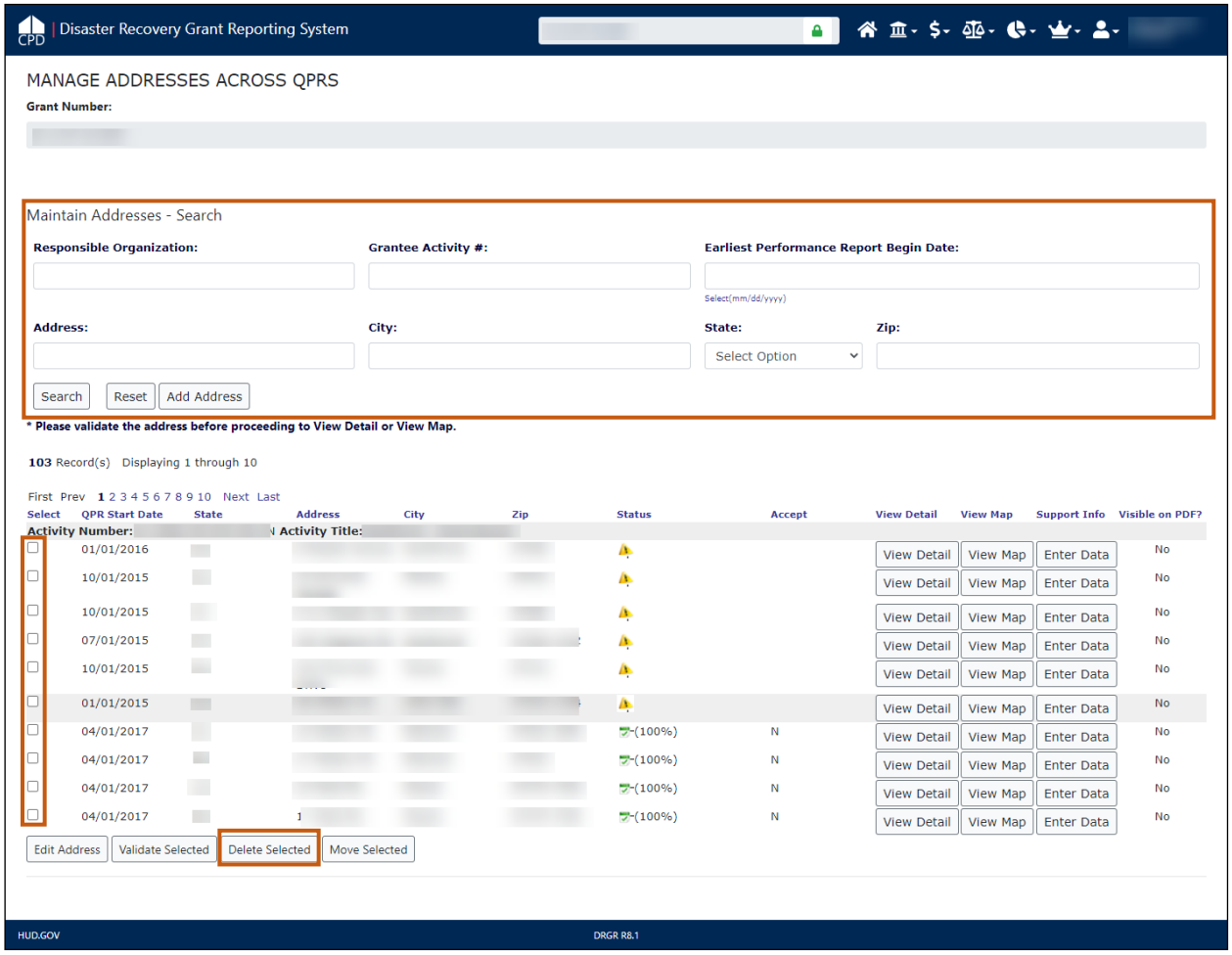
Purpose: Allow Grantee Users to delete addresses.

Complete the following steps to delete addresses from DRGR:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Addresses>** link. The **"Manages Addresses Across QPRs"** page will load. Search for the address to be deleted by using the search steps described in Section B2 above. Results will load. Select the address(es) to be deleted and then select **<Delete Selected>.** Users may select all addresses displayed on the page and delete all selected addresses at once. User may need to delete addresses from multiple search pages if results span more than one page. (See next page for screen shot.)

The remainder of this page intentionally left blank.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses



The remainder of this page intentionally left blank.

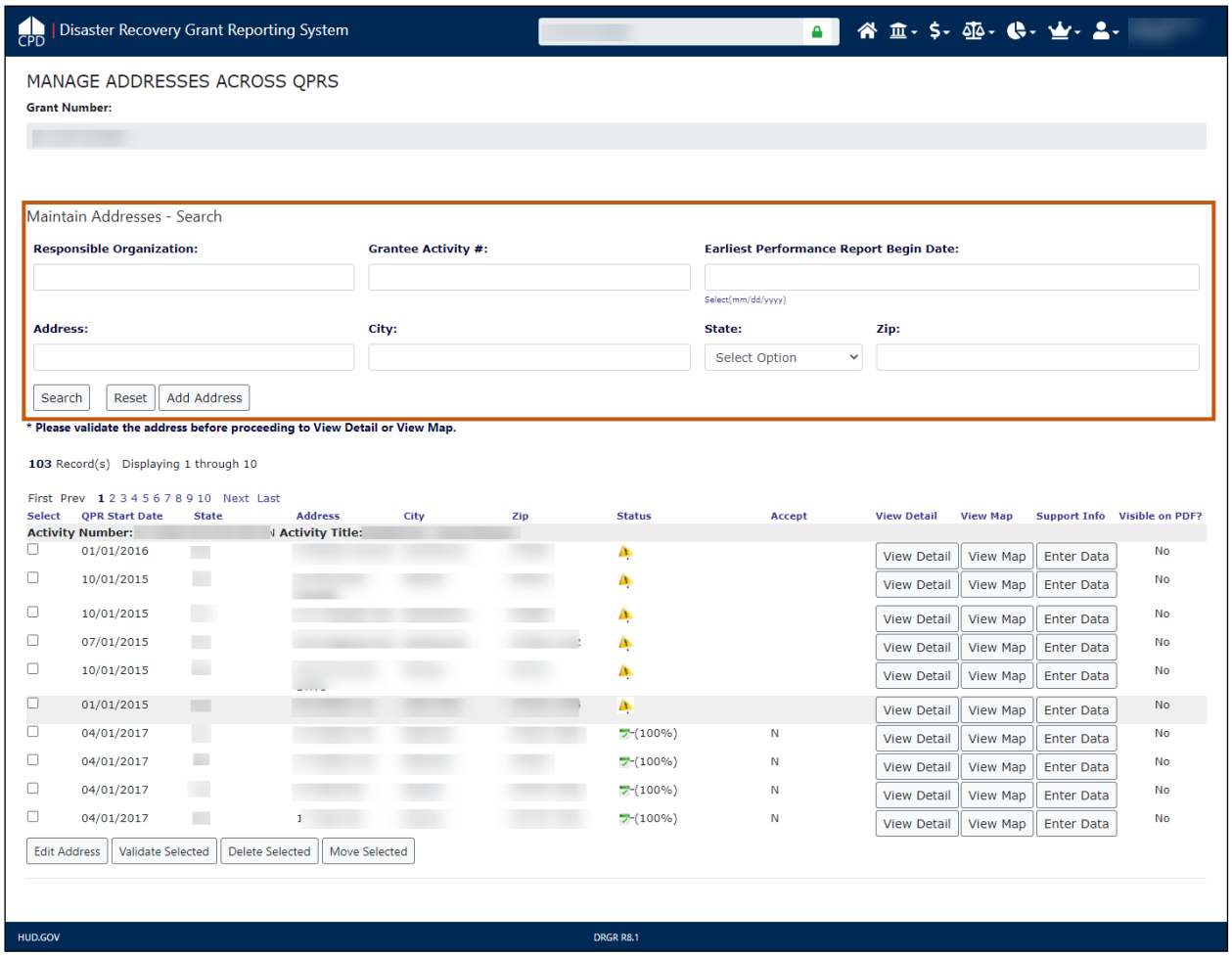
B5. Grantee | Validate Address

Validating addresses is an optional tool, but it helps users ensure that addresses are accurately entered and actually existing. In some cases, such as in newer developments or in rural areas, the DRGR System may not be able to validate the address.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses
Purpose: Allow Grantee Users to validate addresses.	

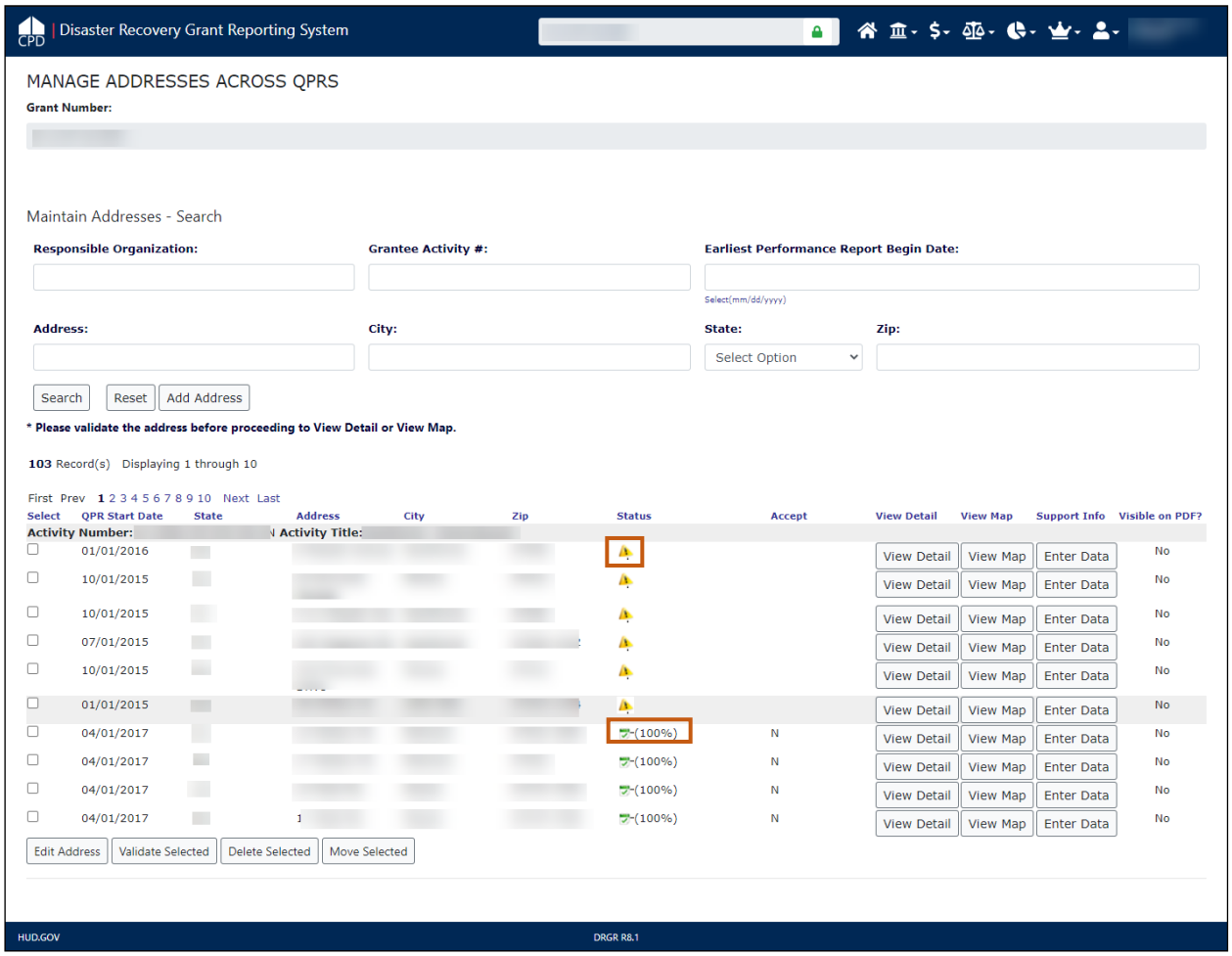
Complete the following steps to valdate an address in DRGR:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Step A1 above. Select the **<Manage Addresses>** link. The **"Manages Addresses Across QPRs"** page will load. Search for the address to be deleted by using the search steps described in Section B2 above. Results will load. Select the address(es) to be validated and then select **<Validate Selected>.** Users may select all addresses displayed on the page and delete all selected addresses at once. User may need to deleted addresses from multiple search pages if results span more than one page.



User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

2 Upon validating the address, DRGR will show either 100% validation for a fully validated address or the yellow triangle warning sign for an address that could not be fully validated. Users should check addresses that could not be fully validated to ensure the address was properly entered.



B6. Grantee | Enter Support Data

With certain Grant programs, such as the Neighborhood Stabilization Program (NSP), Grantees are required to document affordability information for certain properties. For NSP, this information is required to be entered before an NSP Grant can be closed. Grantees will update this information as necessary through their annual reports following closeout.

PROGRAM PROCESS RECOMMENDATION:

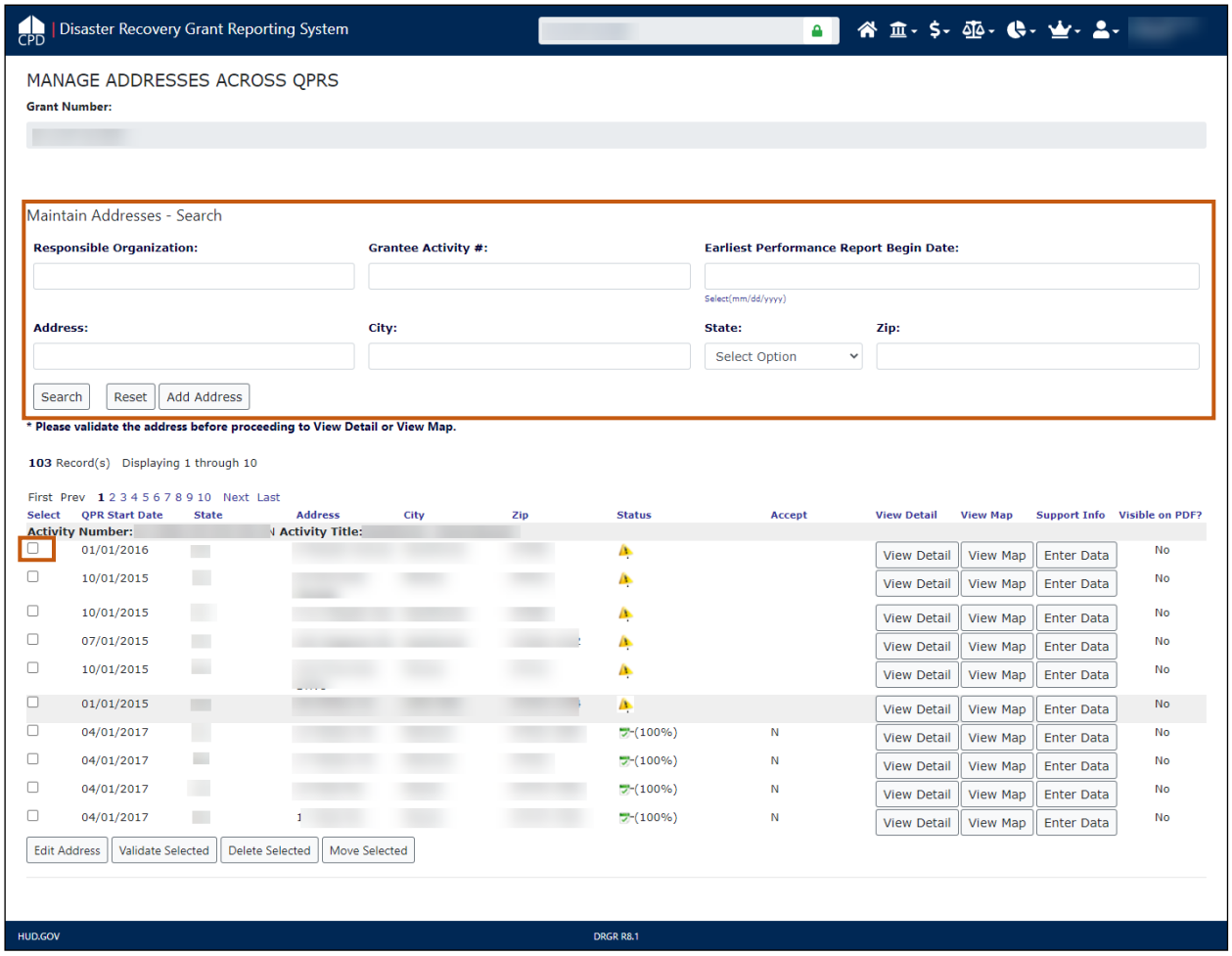
Support Data for Addresses is not required for all appropriations. Check with your CPD representative to confirm whether support data is needed.

User Role: Grantee User (excluding TA Provider User)	**Menu Option:** Manage Addresses

Purpose: Allow Grantee Users to enter support data for addresses, where required.

Complete the following steps to enter support data for addresses:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. Select the **<Manage Addresses>** link. See Step A1 above. The **"Manages Addresses Across QPRs"** page will load. Search for the address to be deleted by using the search steps described in Section B2 above. Results will load. Select the address to which support data will be added, and then select **<Enter Data>.** The "**Edit Address Support Information"** page will load.



2 On the **"Edit Address Support Information"** page, complete all fields, as required. Select the **<Save Address Info>** button to save the address support information.

User Role: Grantee User (excluding TA Provider User)	Menu Option: Manage Addresses

ENTER REQUIRED ADDRESS INFO - CLOSEOUT

Edit Address Support Information

Grant Number:

Grant Activity Number:

Activity Type:
Acquisition - buyout of residential properties

Activity Title:

***Property Status:** Select

Affordability Start Date: Select Date (ex: mm/dd/yyyy)

Affordability End Date: Select Date (ex: mm/dd/yyyy)

Description of Affordability Method (Resale, Recapture, Rental or Other):

Activity Type for End Use: Select

Projected Disposition Date: Select Date (ex: mm/dd/yyyy)

Actual Disposition Date: Select Date (ex: mm/dd/yyyy)

National Objective for End Use: Select

Date National Objective is met: Select Date (ex: mm/dd/yyyy)

Deadline Date: Select Date (ex: mm/dd/yyyy)

Description of End Use:

Total Expenditure Amount #:

Save Address Info | Cancel

Chapter 21: Performance Report Review Tools | Manage My Grants Module

Chapter 21: Performance Report Review Tools 1

A. Manage My Grants Module Access 3

A1. Grantee | User Access 3

A2. HUD | User Access 3

B. Grantee and HUD Performance Report Review Tools 4

B1. Grantee and HUD | Summary of Performance Report Submission Comments / Review Comments 4

B2. Performance Report Review Checklist 6

B3. Review Active Flags 9

C. HUD Alternate Access to Review Tools 10

C1. Access to Review Tools from the Review QPR Page 10

Chapter 21: Performance Report Review Tools

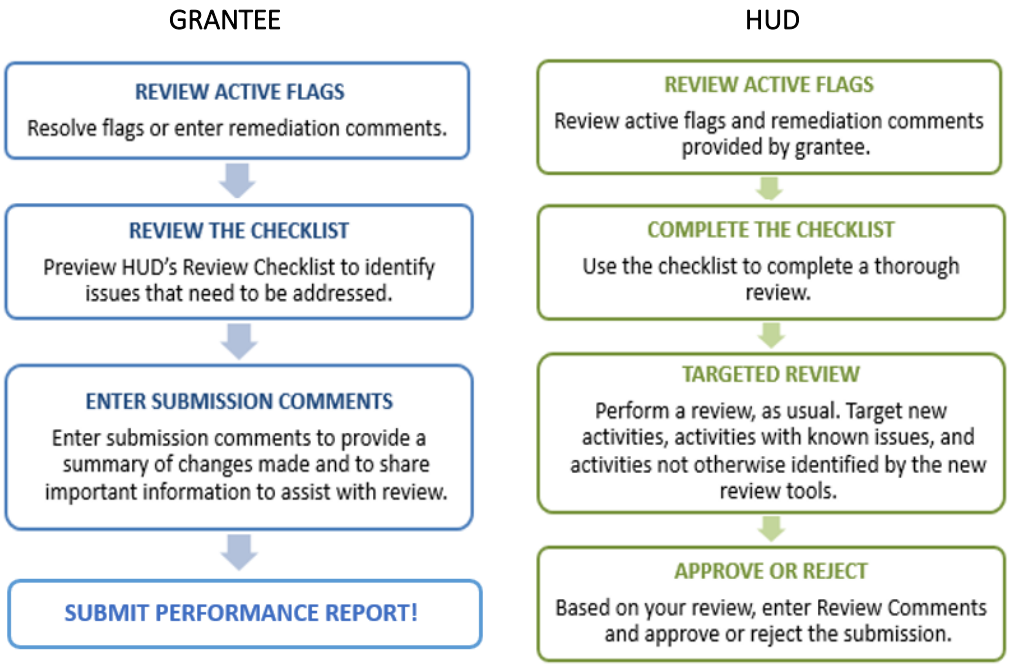
This Chapter provides guidance for accessing and using the Performance Report **"Review Tools"** page under the **Manage My Grants** module. The Performance Report **"Review Tools"** page is there to help Grantees to conduct Quality Assurance/Quality Control on their Performance Reports. They are accessible to all Grantee users. Grantee and HUD Users do not need Performance Report specific roles to access the **"Review Tools"** page.

TIP! Remember that the Action Plan must be in a "Reviewed and Approved" status in order to submit the Performance Report, and only users with the "Submit Performance Report" role will have access to the <Submit> function. See Chapter 5 for more information on user roles.

Ideally Grantees will follow a workflow similar to the one below when submitting a Performance Report. This workflow makes active use of the **"Review Tools"** page to help improve Performance Report submission quality and clarity. Grantees will be using the **"Review Tools"** page to:

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Utilize or Complete the Performance Report Review Checklist
- Review summary of Active Flags and helpful flag information

Grantee Performance Report Submission and HUD Review Workflow



After the Performance Report submission, HUD Reviewers will either approve or reject the submitted Performance Report. HUD's review will be specific to the Grant appropriation and will focus on the compliance of the QPR with Grant requirements and check for accuracy of information. This review will also be a means for the HUD Reviewer to understand how the Grant program has progressed.

As part of this review, HUD Reviewers may use both the **"Review Tools"** page and, for some features, the main **"Review Performance Report"** page to access "Review Tools" features. HUD users will see the same functionality on their **"Review Tools"** page as Grantees see on their **"Review Tools"** page.

PROGRAM PROCESS RECOMMENDATION:

While most Grantees will submit their performance reports on a quarterly cycle and refer to reports as "QPRs" (quarterly performance reports), the reporting cycle and deadline is dependent on Grant appropriation and Grant status.

HUD Reviewers may utilize the following Review Tools features:

- Review summary of Grantee and HUD comments and HUD Supporting Documents
- Access and complete the Performance Report Checklist
- Review summary of Active Flags and helpful flag information

The Performance Report Review Tools functions are summarized below:

Grantee Users

Feature	Subsection	Location
Manage Performance Report	B1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
Manage Performance Report	B2	Review Checklist
Manage Performance Report	B3	Review Active Flags

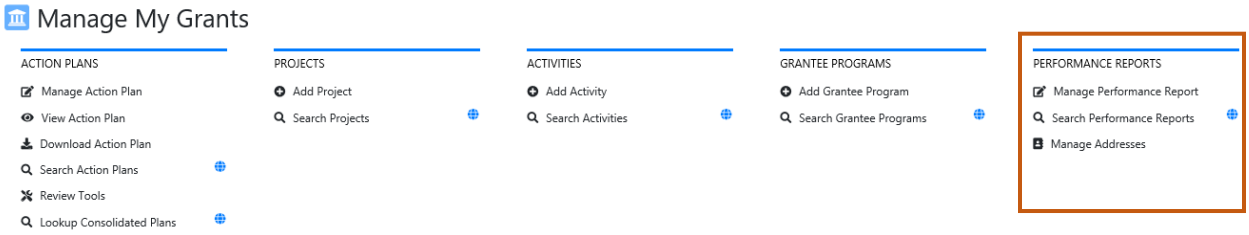
HUD Users

Feature	Subsection	Location
Manage Performance Report Review Performance Report	B1/C1	Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents
Manage Performance Report Review Performance Report	B3/C1	Review Checklist
Manage Performance Report Review Performance Report	B4/C1	Review Active Flags

A. Manage My Grants Module Access

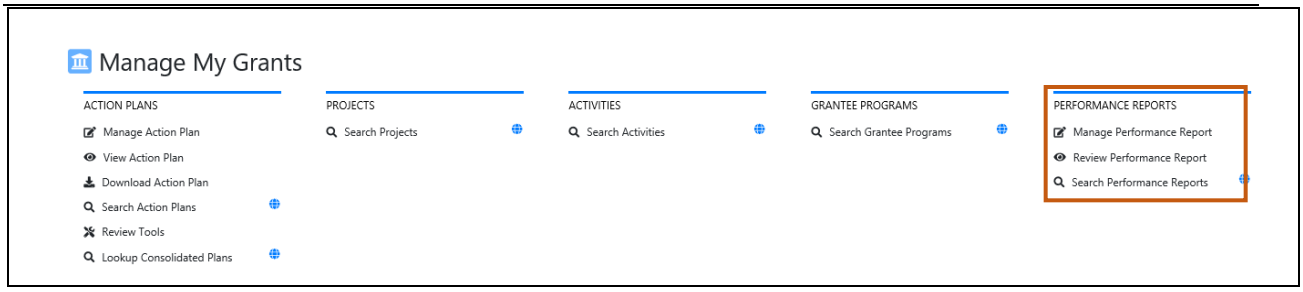
The **Manage My Grants** module contains all Performance Report Review Tools actions.

A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Performance Report Review Tools.	
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 System displays the relevant menu items based on user type and user roles. 	

A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access the Performance Report **"Review Tools"** page.	
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 System displays the relevant menu items based on user type and user roles.	



B. Grantee and HUD Performance Report Review Tools

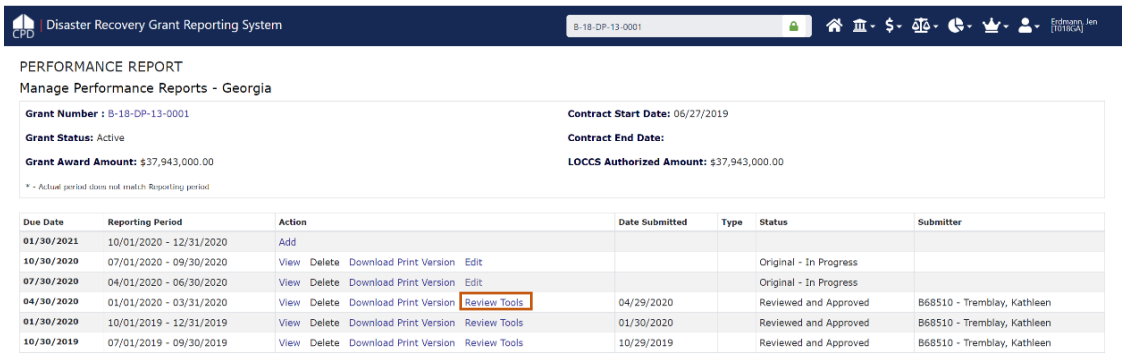
Below is a summary of the various features of the Performance Report **"Review Tools"** page and how to access them. As noted previously, Grantee and HUD users have access to the same Review Tools. Grantees will use them to review Performance Report submissions to ensure quality, and HUD CPD Representatives will use them to review the Grantee's submission to facilitate their review and ensure compliance.

B1. Grantee and HUD | Summary of Performance Report Submission Comments / Review Comments

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Users to review previously entered and saved Grantee Performance Report submission comments, HUD Review Comments, and HUD Supporting Documents.	

Complete the following steps to view the submission comments, review comments, and supporting documents:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Sections A1 and A2 above. Select the **<Manage Performance Report>** link. The **"Manage Performance Report"** page will load. Select the **<Review Tools>** link in the "Action" column next to the desired reporting period. The **"Review Tools"** page will load.



2 As described in Chapter 22 – Performance Report Submission and Approval, Grantees may submit comments to HUD along with their submission of the Performance Report. Any saved Grantee submission comments will be displayed on the **"Review Tools"** page. HUD recommends including

submission comments with each Performance Report submission. If the Submission Comments section displays "none," then no Submission Comments have been entered and saved.

Review Tools

Jan 1, 2020 thru Mar 31, 2020 Performance Report

Grant Number:
B-08-MN-27-0001

Grantee Name:
Minneapolis, MN

Grantee submission Comments

None

HUD Review Comment:

None

HUD Review Supporting Documents:

None

Performance Benchmarks

None

Review Checklist

Review Checklist

Flags

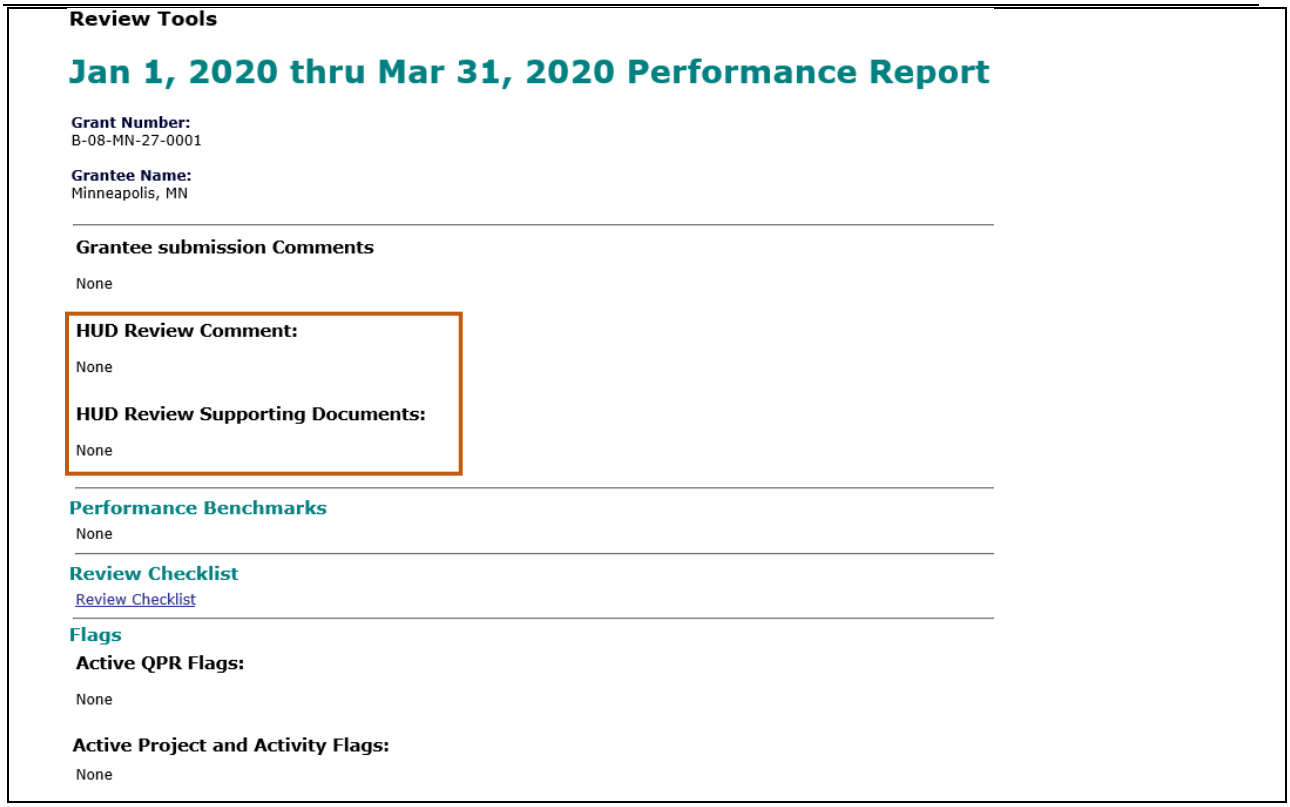
Active QPR Flags:

None

Active Project and Activity Flags:

None

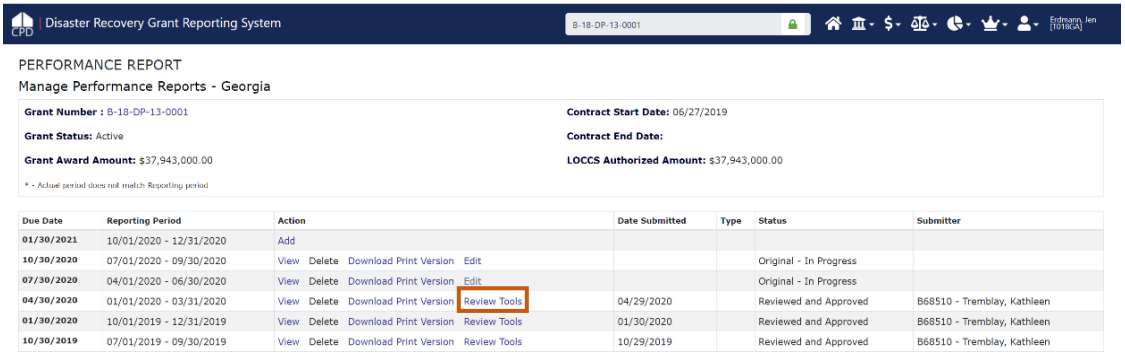
3 Similarly, HUD reviewers may provide comments and supporting documents in response to their review and approval or rejection of a Grantee's submitted Performance Report. A summary of HUD's comments and the supporting documents can be accessed from the "Review Tools" page. See Chapter 22 – Performance Report Submission and Approval for HUD's review steps.



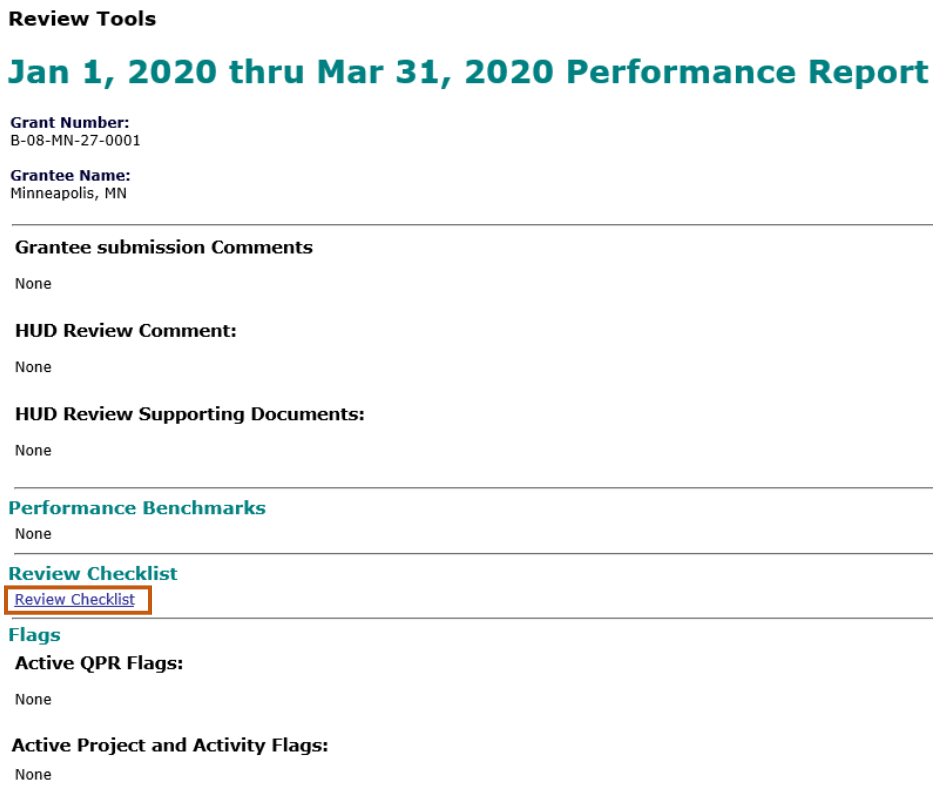
B2. Performance Report Review Checklist

The Performance Report Checklist allows Grantees and HUD to review Performance Reports using a semi-automated checklist. The Checklist includes a series of questions, some of which will DRGR-calculated answers. This allows Grantees to identify some issues with the Performance Report submissions that would be highlighted by the HUD CPD representative in its review. By using the checklist prior to submission, the Grantee is able to address concerns before they arise in HUD's review, thereby, ensuring a faster approval.

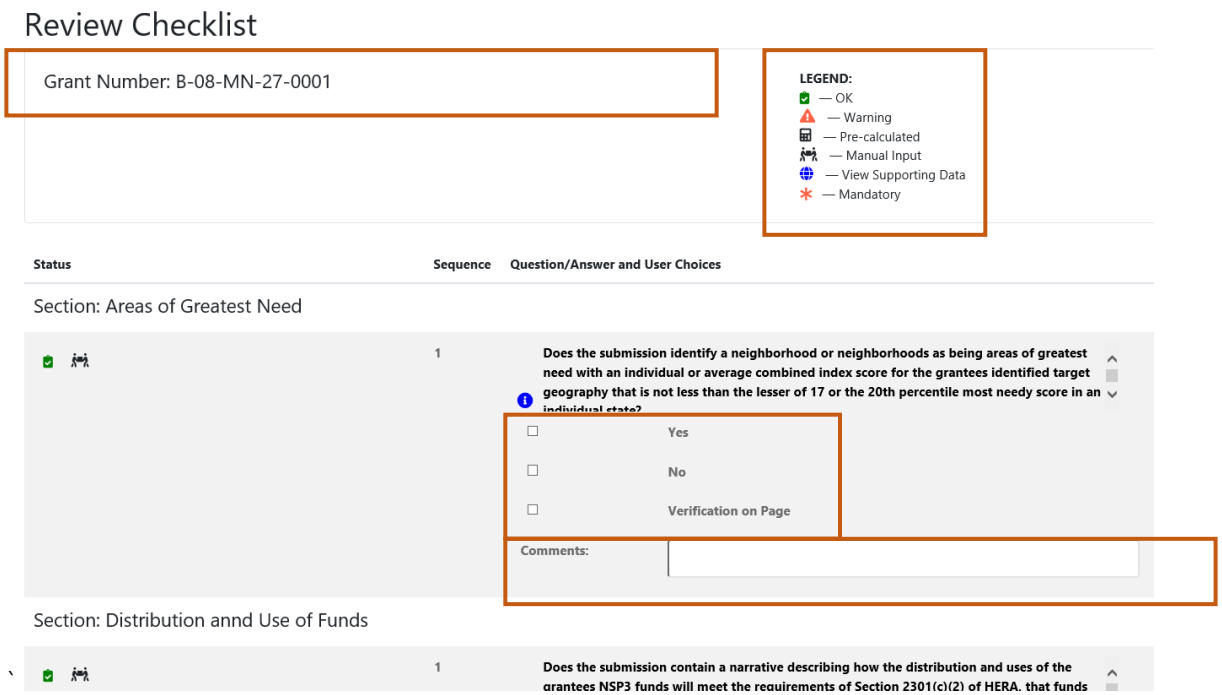
User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Grantee and HUD User access to the Performance Report Checklist.	
☑ Complete the following steps to view the "Review Checklist" page:	
1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Sections A1 and A2 above. Select **<Manage Performance Report>**. The **"Manage Performance Report"** page will load. Select the **<Review Tools>** link in the "Action" column next to the desired reporting period. The **"Review Tools"** page will load.	



2 On the **"Review Tools"** page, users will find the **<Review Checklist>** link. Select this link to open the Review Checklist in a new tab or page.



3 The Review Checklist is customized to each appropriation. Many questions will have “yes” or “no” responses while some request figures. Other questions provide an opportunity for comment. The Review Checklist legend shows icons that help to describe each type of question on the Checklist. The “Review Checklist Legend Icons” table below describes each icon in the legend.



Review Checklist Legend Icons

ICON	DESCRIPTION
— OK	The “OK” icon indicates that a question has been satisfied and no further action is needed.
— Warning	The “Warning” icon indicates that action is needed to ensure compliance. Questions that are mandatory and do not have a response will be displayed with a warning icon.
— Pre-calculated	The “Pre-calculated” icon indicates questions that are auto computed by the System. If a response to a checklist question is auto computed, then the System displays a non-editable answer. Although auto computed responses may not be edited, the user can add comments.
— Manual Input	The “Manual Input” icon indicates questions that are not auto computed and need to be completed manually.

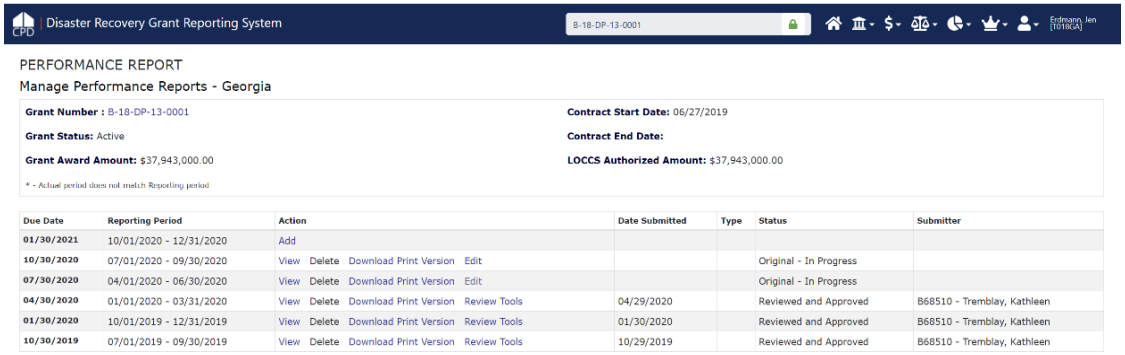
— View Supporting Data	The "View Supporting Data" icon indicates questions that have been configured to display the supporting data associated with the question's auto-computed responses. On selection of this icon, the System will open a new window to display the supporting data.
* — Mandatory	The "Mandatory Questions" icon indicates questions that must be answered before submission.

B3. Review Active Flags

User Role: Grantee and HUD User	**Menu Item:** Review Tools
Purpose: Allow Grantee and HUD Users to review summaries of Active Flags.	

Complete the following steps to view the Active Performance Report Flags:

1 Navigate to the **Manage My Grants** module and locate the **Performance Reports** menu. See Sections A1 and A2 above. Select **<Manage Performance Report>**. The **"Manage Performance Report"** page will load. Select the **<Review Tools>** link in the "Action" column next to the desired reporting period. The **"Review Tools"** page will load.



2 The **"Review Tools"** page provides a summary of all Active Performance Report Flags and "Active Project and Activity Flags." Summary view only information is provided for each active flag. Detailed steps related to a Grantee's resolving and remediating of active flags and HUD's comments on active flags are described in Chapter 32 – Compliance: Flags. Grantees should resolve or remediate flags prior to submitting the Performance Report.

Flags

Active Action Plan Flags:

Flag Subcategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Flagged Since
AP STRUCTURE	GRANT	COMPLIANCE	PLANNING CAP EXCEEDED DR		08/04/2019

Active Project and Activity Flags:

None

C. HUD Alternate Access to Review Tools

As described above, both Grantees and HUD CPD Representatives use the Review Tools features to assist in their roles. Grantees use the tools to ensure a quality submission. HUD CPD Representatives use the tools to facilitate their review and ensure compliance. In addition to accessing the Review Tools features from the **"Review Tools"** page as described in Section B above, HUD Users will access the **"QPR Review"** page to change the status of a submitted Performance Report to Approved or Rejected.

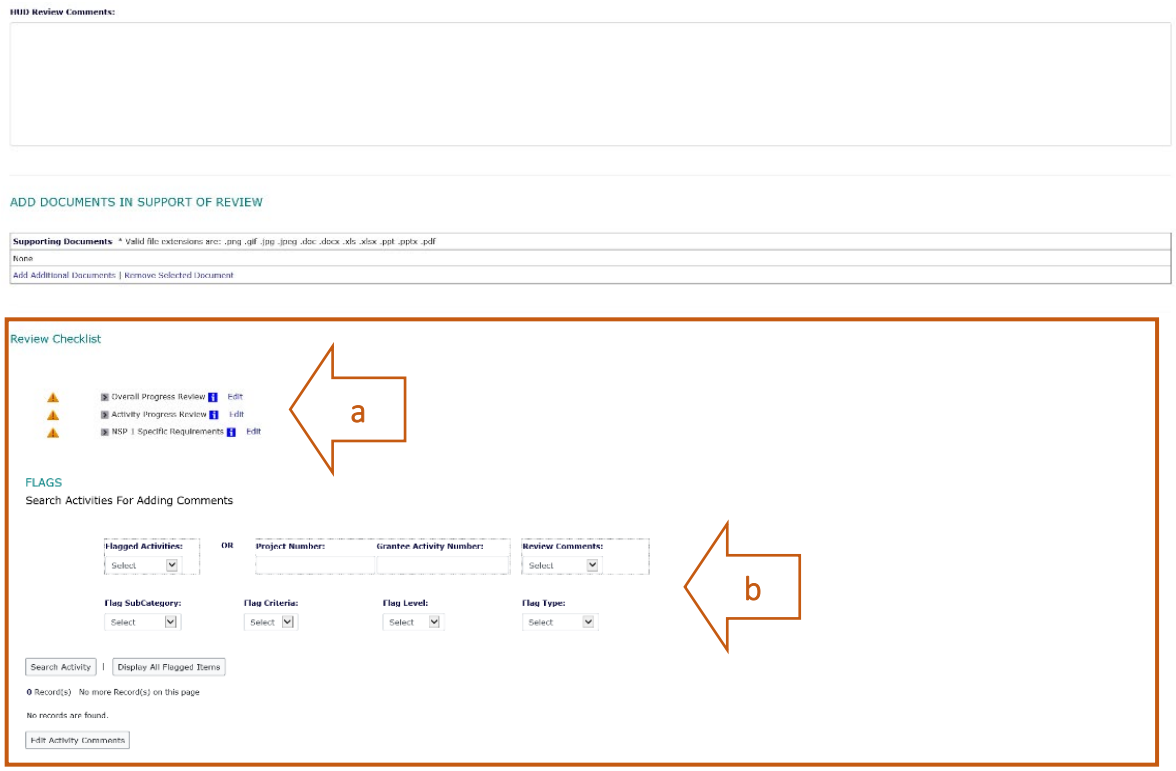
Note the difference between HUD's use of the "**QPR Review"** page and the **"Review Tools"** page.

- The **"QPR Review"** page is the page that loads after selecting the **<Review>** link from the **"Manage Performance Reports"** page. On the **"QPR Review"** page HUD Users approve or reject the Performance Report, enter review comments, and add supporting documents. They may also access the Performance Report Review Checklist and Flags.
- In contrast, the **"Review Tools"** page provides a summary of all Grantee and HUD user review actions.

C1. Access to Review Tools from the Review QPR Page

User Role: HUD User	**Menu Item:** Review Performance Report
Purpose: Allow HUD Users to access Review Tools from the **"Review QPR"** page.	
✓ Complete the following steps to access Review Tools from the "Review QPR" page:	
1 Navigate to the **Manage My Grants** module and locate the **Manage Performance Reports** menu. See Section A1 and A2 above. Select **<Review Performance Reports>**. The **"Review QPR"** page will load.	

2 The process for entering review comments and changing the status of the Performance Report are discussed in detail in Chapter 22 – Performance Report Submission and Approval. In addition to these functions, the **"Review QPR"** page includes direct access to certain Review Tools. On the **"Review QPR"** page, the HUD CPD Representative will find: (a) a summary of Checklist items to review with **<Edit>** links that direct the reviewer to the Checklist, and (b) the ability to search for active flags to provide comments.



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

Chapter 22: Performance Report Submission and Approval | Manage My Grants Module 1

A. Manage My Grants Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Performance Report Submissions 3

B1. Performance Report Status 3

B2. Review Tools 4

B3. Troubleshooting 4

B4. Grantee | Submit Performance Report 5

C. Performance Report Reviews 7

C1. HUD | Review Performance Report 7

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

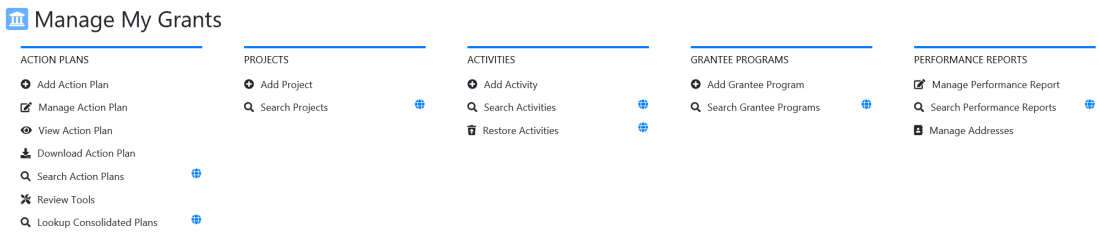
A. Manage My Grants Module Access

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.	
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.



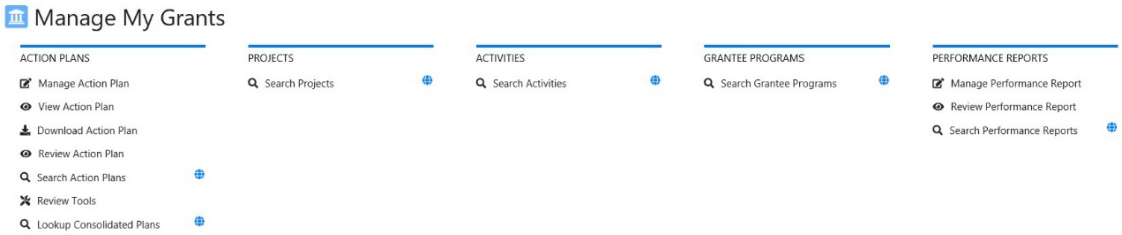
A2. HUD | User Access

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.



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.

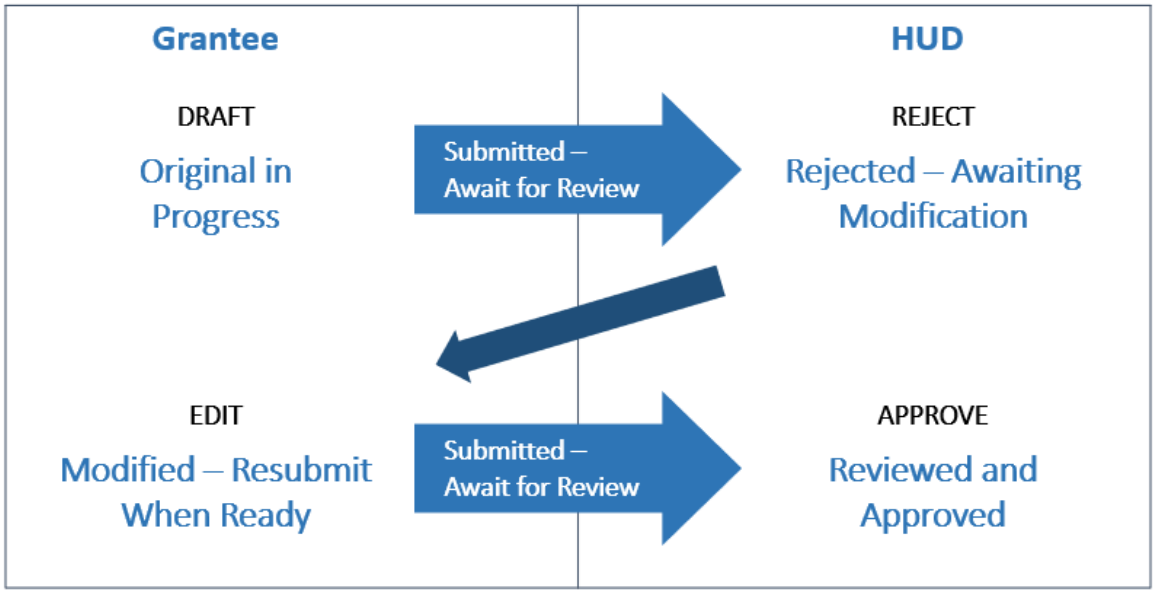
Quarterly Performance Report Submission Dates

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.

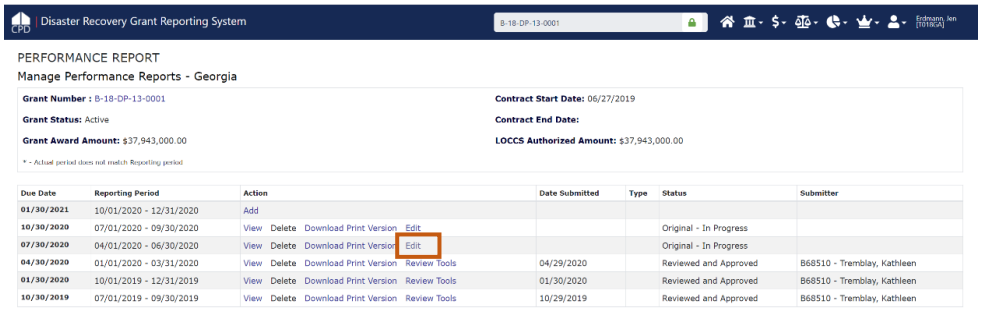
B4. Grantee | Submit Performance Report

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

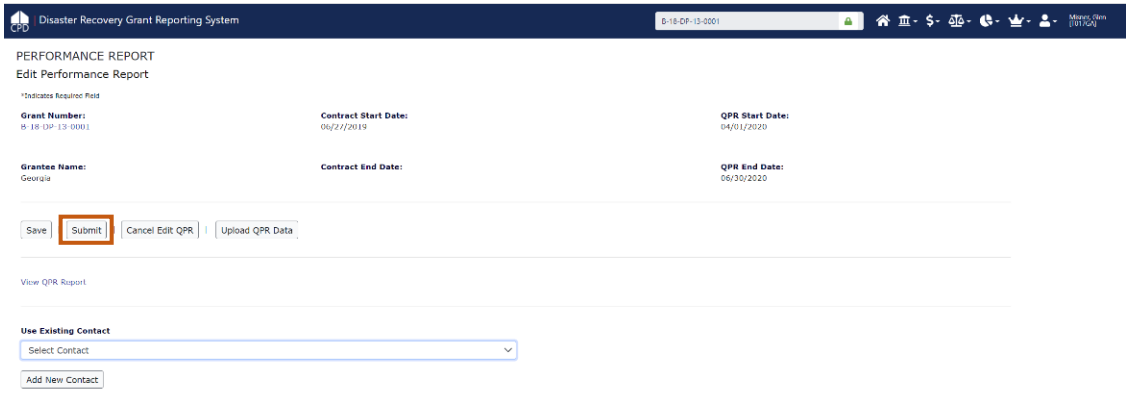
User Role: Grantee User	**Menu Option:** Manage Performance Report
Purpose: Allow Grantee Users to edit and submit the DRGR Performance Report for HUD review.	
Complete the following steps to submit a DRGR Performance Report:	
1 Navigate to the **Manage My Grants** module and ensure the decided Grant 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.

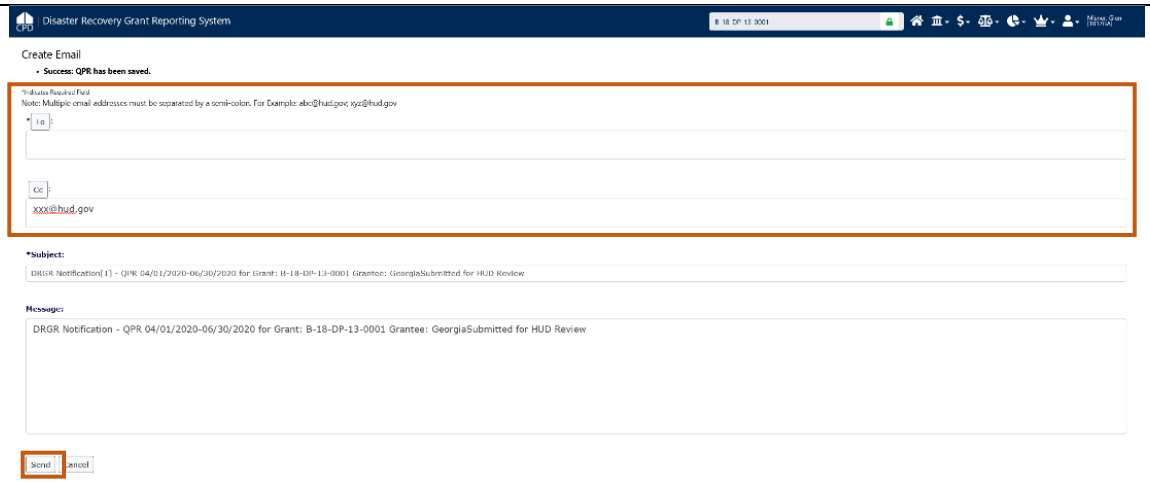
TIP: Grantee Users should ensure that Performance Reports are submitted in order. Complete the Performance Report for the most recently ended quarter before submitting the next Performance Report.



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.



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.

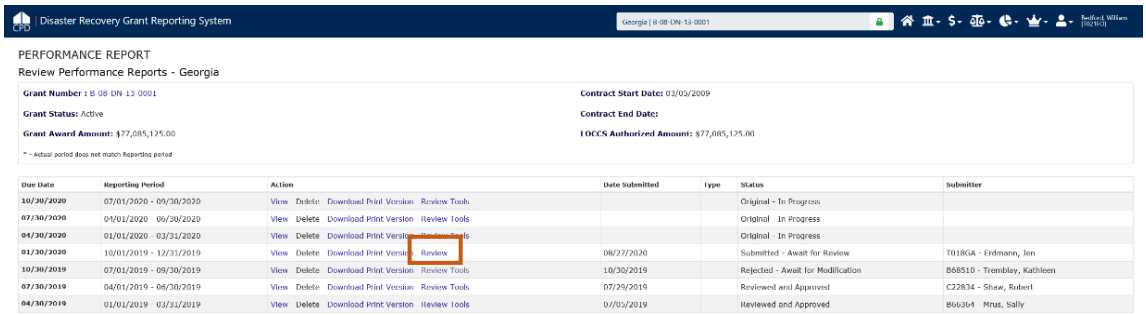
As part of this review, HUD Reviewers utilize the **"Review Screen"** and **"Review Tools"** feature to access the **Performance Report Checklist**, provide comments on active activities and flags, enter overall review comments, and attach supporting documents (See Chapter 21 – Performance Report Review 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.	

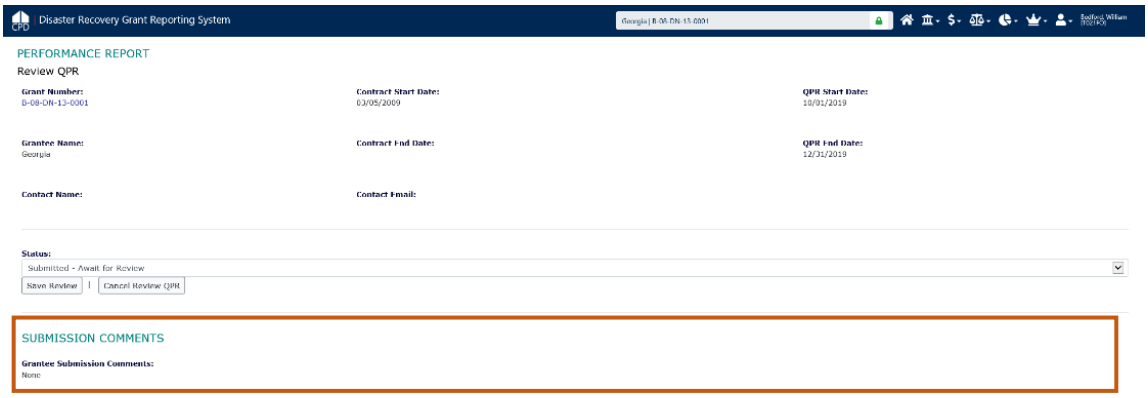
User Role: HUD User	**Menu Option:** Review Performance Report

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



2 The **"Review QPR"** page loads. From this page the HUD user can easily:

a. Review Submission Comments from the Grantee;

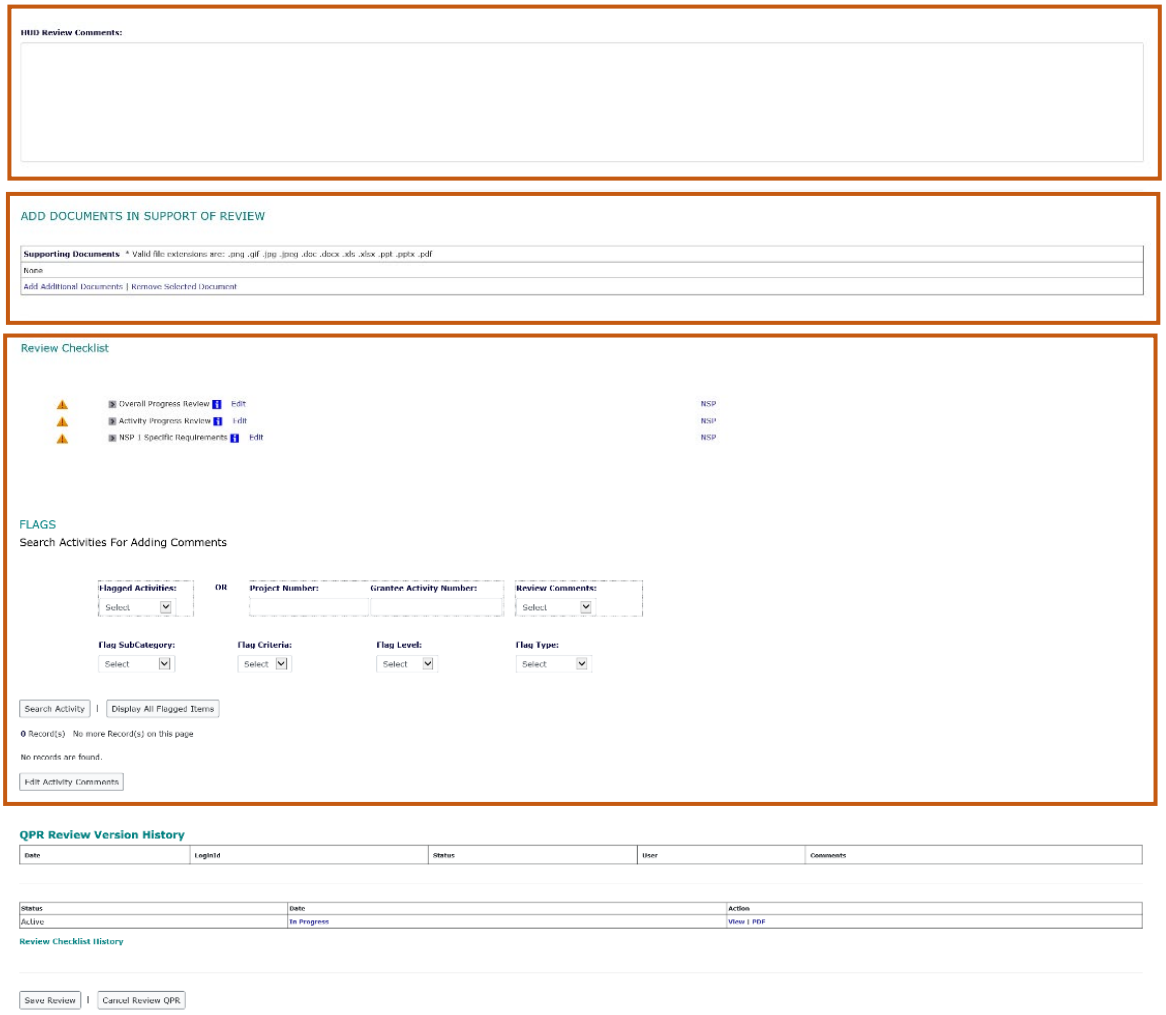


b. Add review comments;

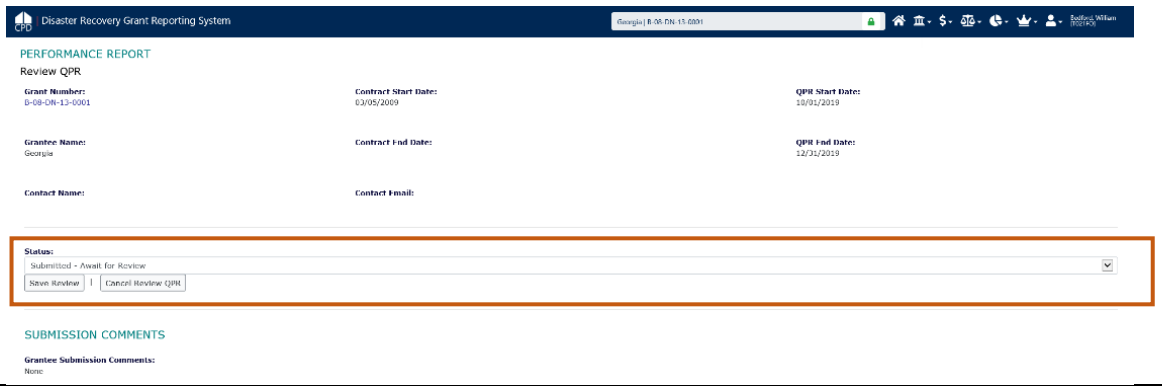
c. Add supporting documents to the review; and

d. Access the "Review Checklist" and flags.

User Role: HUD User	Menu Option: Review Performance Report



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.



Chapter 23: Financial Overview and Roles | Manage My Financials Module

Chapter 23: Financial Overview and Roles | Manage My Financials Module 1

A. Overview of Manage My Financials Module 1

A1. Create, Approve, and Revise Vouchers 1

A2. Program Income Accounts and Receipts 3

B. Glossary of Manage My Financials Module Terms 3

Chapter 23: Financial Overview and Roles | Manage My Financials Module

The purpose of this Chapter is to provide a general overview of the **Manage My Financials** module, including guidance related to obligating funds, maintaining vouchers, managing program income, and other related functions such as blocking drawdowns and returning funds to Line of Credit Control System (LOCCS). This Chapter includes tasks performed by authorized Grantee Users (including TA Provider users) as well as tasks performed by HUD users. In this Chapter, authorized users are those with the Request Drawdown or Approve Drawdown role. This Chapter also references "activities," which is inclusive of "TA work plans" submitted by TA Provider Users in DRGR.

A. Overview of Manage My Financials Module

A1. Create, Approve, and Revise Vouchers

In the **Manage My Financial** module, Grantee Users create, approve, and revise vouchers, also called drawdowns. Vouchers include both requests for payment made by the Grantee against the Grantee's United States Treasury line of credit (also known as the Grant Award Amount or LOCCS amount) for Grant fund payments for services performed in support of one or more activities. Vouchers also document the use of program income held in the Grantee's local account. See Chapter 25 – Program Income for more information on receipting and management of program income.

TIP! Grantees cannot create a voucher for an Activity not yet approved by HUD. Action Plan approval required.

All vouchers are created at the *activity level*. Before a Grantee can create a voucher, the Grantee must ensure that:

- The activity shows on an approved Action Plan.
- The activity budget has enough funds budgeted and available from a DRGR funding source (e.g., CDBG-DR, NSP, RIF, TA, or PFS) and/or Receipt Funds (Program Income);
- The activity obligation amount is sufficient to cover the voucher amount; and
- The Grantee has two DRGR Users with "Drawdown Roles"- one to request, or create, the voucher, and another to approve the voucher. A summary of the actions that individuals with Drawdown roles can take is provided in the "Grantee Drawdown Roles in the Voucher Creation Process" table below. See Chapter 24 – Obligations and Vouchers for more information on the voucher creation process. See Chapter 5 – User Management and Certifications on how to set up user roles in DRGR.

After a voucher is created, Draw Requestors can also revise open vouchers and vouchers that have been approved. Any Draw Requestor can revise a voucher, even if it was not created by that Draw Requestor. A Draw Approver must approve revised vouchers to complete the revision process.

The remainder of this page intentionally left blank.

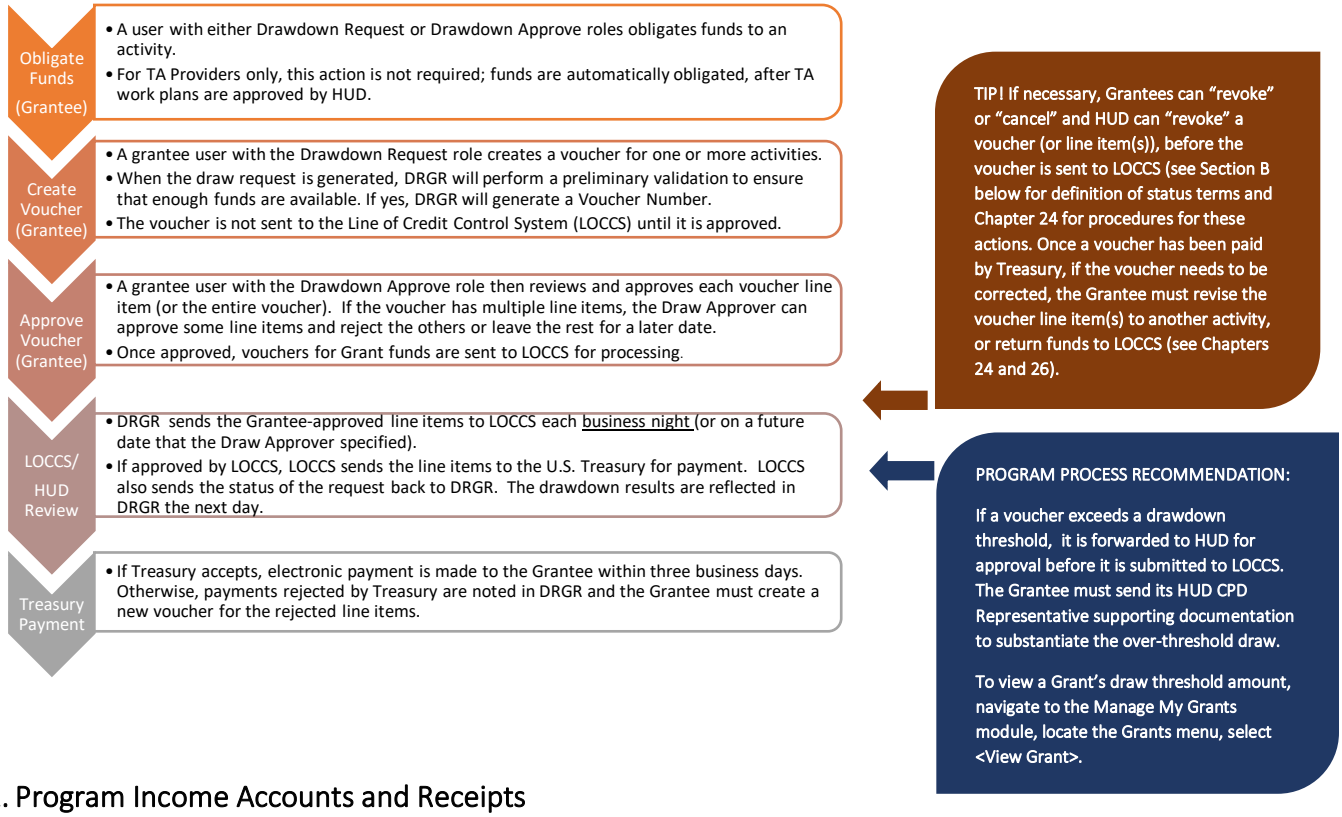
Grantee Drawdown Roles in the Voucher Creation and Approval Process

	Draw Requester	Draw Approver	Notes
Obligate Funds	X	X	Enough funds must be obligated in order to create a voucher. Both Drawdown roles can obligate funds to activities. Note: this action is not applicable to TA Providers.
Search/View Vouchers and Obligations	X	X	Both Drawdown roles can search and view existing obligations and vouchers.
Create of Voucher	X		The Draw Requester initiates the creation of a voucher and selects the activities, amounts, and source of funds (program funds or program income) to draw. The Draw Requestor also includes comments on the voucher and attaches any voucher supporting documents.
Approve/Reject a Voucher Line Item		X	The Draw Approver can approve or reject any voucher line item generated by the Draw Requester. Draw Approvers can also include comments on the voucher.
Revise a Voucher Line Item	X		The Draw Requester can revise open and approved voucher line items.
Approve/Reject a Voucher Revision		X	Voucher revisions must be approved by the Draw Approver just like regular vouchers.
Cancel Voucher Line Item	X		The Draw Requester can cancel a voucher line item only if the voucher line item has not yet been approved.
Revoke Approval of a Voucher Line Item		X	The Draw Approver can revoke an approval only if the voucher line item has not yet been processed by LOCCS.

The Voucher Process diagram below summarizes the steps a Grantee and HUD will take to complete the voucher process for Grant funds. For more information on voucher creation and approval, see Chapter 24 - Obligations and Vouchers.

The remainder of this page intentionally left blank.

Voucher Process



A2. Program Income Accounts and Receipts

If a Grantee generates Program Income (PI), they must track program income sources and uses in DRGR. Program Income is revenue directly generated by activities carried out with Grant funds, but Grantees should consult with their CPD Representative regarding what constitutes "Program Income" and if certain thresholds exist in their programs for reporting purposes (e.g., if cumulative annual receipts are less than $35,000, the Grantee may not be required to report Program Income).

Program Income is managed in DRGR by:

- DRGR users with Request Drawdown or Approve Drawdown roles – see Chapter 5 – User Management and Certifications of this User Manual.
- Budgeting Program Income at the Action Plan, Project, and Activity Level – see Chapters 10 – 14 of this User Manual.
- Creating Program Income Receipts, typically against the activity that generated the PI – see Chapter 25 of this User Manual.
- Drawing Program Income on Vouchers against the activity that expended the PI – see Chapter 23 of this User Manual.
- Optional: Creating Program Income Accounts and RLF Accounts – see Chapter 25 of this User Manual.

B. Glossary of Manage My Financials Module Terms

The following terms are commonly used in reference to the Drawdown Module:

Drawdown: A means by which a Grantee requests funds from their Line of Credit. Also referred to as a "Voucher."

Drawdown Roles: To carryout drawdown functions, a DRGR User must have one of the following roles, which will dictate which permissions they have:

Draw Requester: This DRGR User can create or "request" a voucher.

Draw Approver: This DRGR User can approve Voucher Line Items created by the Draw Requester.

Drawdown Blocks: HUD can block DRGR users from drawing down funds from activities. When an activity is blocked, all drawdown activity is prohibited until the block is lifted.

Drawdown Threshold: HUD places a limit on the maximum amount of each voucher (i.e. $5 Million). If a voucher exceeds the limit, the voucher requires HUD approval before the voucher is processed by LOCCS. Grantees must attach supporting documentation to the voucher for HUD review and approval. Thresholds vary by appropriation. Consult with your CPD Representative for further information.

Fund Type: Refers to Program Funds or Program Income.

LOCCS: The Line of Credit Control System (LOCCS) is HUD's system for processing Program Fund disbursements. DRGR interfaces with LOCCS and wire transfers approved vouchers to the Grantee's locally designated account.

Maintain: A function in DRGR which allows DRGR Users to act on a Voucher Line Item. For example, if a Draw Approver wishes to approve a Voucher Line Item, the user will need to click "Maintain" on that Voucher Line Item in order to approve the Voucher Line Item. The Maintain function also allows users to revise, reject, revoke, and cancel Voucher Line Items.

Obligate: A means by which funds are committed to an activity. Funds must first be obligated to an activity before funds can be drawn from the activity. The definition of obligation varies by appropriation. Consult with your CPD Representative for further information.

Program Funds: Grant Funds authorized by HUD via the appropriation and subsequent Grant agreement(s).

Program Income: Program Income is revenue directly generated by activities carried out with Grant funds. Consult with your CPD Representative for further information.

Program Income Account: An optional mechanism in DRGR by which a Grantee can "wall off" certain program income receipts from being drawn against other activities. Program Income Accounts should only be used in certain circumstances, such as when a Grantee has a written agreement allowing a subrecipient to retain their program income for other eligible uses. Consult with your CPD Representative for further information.

Program Income Receipt: The process of reporting program income in DRGR. Grantees are required to report all program income in DRGR. A "Receipt" records that program income has been received, and a "Drawdown" (of PI funds) reports the program income has been expended.

Return Funds: A process by which a Grantee has returned funds already drawn in DRGR to LOCCS. Funds are returned, for example, when your CPD Representative requests the funds be returned after discovering the funds were drawn for an illegible use.

Voucher: A means by which a Grantee request funds from their Line of Credit. Also referred to as a "Drawdown."

Voucher Actions: The following actions can be carried out by a DRGR User with one of the Drawdown Roles with respect to vouchers:

Approve: A Draw Approver can approve one or more Voucher Line Items created by the Draw Requester. Approving a Voucher Line Item will send the voucher to LOCCS for processing.

Create: A Draw Requester can create vouchers, the first step in the creation of a new voucher.

Cancel: A Draw Requester can cancel a Voucher Line Item already created, but not yet approved by the Draw Approver. Cancelling a Voucher Line Item prevents the Draw Approver from approving the Voucher Line Item.

Reject: A Draw Approver can reject one or more Voucher Line Items created by the Draw Requester. Rejecting a Voucher Line Item will prevent the Voucher Line Item from being sent to LOCCS for processing.

Revise: A Draw Requester can revise an existing Voucher Line Item that has already been approved and processed by LOCCS. Voucher revisions are typically used to correct prior mistakes (i.e. due to billing or user error) or, for example, when a cost must be re-categorized by National Objective, or when a payment must be re-associated from one activity to another. Consult with your CPD Representative to help decide whether funds already drawn should by returned to LOCCS, or if a voucher revision is allowable.

Revoke: A Draw Approver can revoke a Voucher Line Item they have approved, only if the Voucher Line Item has not yet been processed by LOCCS. Revoking an approval essentially rescinds the approval, thereby preventing LOCSS from processing the Voucher Line Item.

Voucher Line Item: A voucher can contain one or more Voucher Line Items. DRGR will automatically create a separate Voucher Line Item for every activity and fund type added to a voucher by the Draw Requester.

Voucher Line Item Status: A Voucher Line Item can have one of the following statuses:

Approved: The Voucher Line Item has been approved, but not yet processed by LOCCS. For Program Income Line Items, the final status is “Approved” since program income is not processed by LOCCS.

Completed: The Voucher Line Item has been processed by LOCCS.

Open: The Voucher Line Item has been created and is awaiting further action.

Rejected: The Voucher Line Item has been rejected by the Draw Approver and no further action can be taken.

Revised Pending Approval: A Voucher Line Item has been revised by the Draw Requester and awaits action by the Draw Approver.

Revised: A Voucher Line Item revision initiated by the Draw Requester has been approved by the Draw Approver and is therefore successfully revised from one activity to another (or revised to multiple other activities).

Chapter 24: Financial Obligations and Vouchers | Manage My Financials Module

Chapter 24: Financial Obligations and Vouchers 1

A. Manage My Financials Module Access 1

A1. Grantee | User Access 2

A2. HUD | User Access 3

A3. HUD and Grantee| Search in Manage My Financials 3

B. Maintain Obligations 4

B1. Grantee | Obligating Funds to an Activity (Not for TA Users) 6

C. Maintain Vouchers 7

C1. Grantee | Create a Voucher 8

C2. Grantee and HUD| View a Voucher Line Item 14

C3. Grantee | Cancel a Voucher Line Item 15

C4. Grantee | Approve/Reject or Revoking a Voucher Line Item 16

C5. Grantee | Revise a Voucher Line Item 20

Appendix 1: View Voucher Line Item – Description of Information 24

Chapter 24: Financial Obligations and Vouchers

This Chapter provides instruction to authorized users to access and use the core functionality of the **Manage My Financials** module. Authorized Grantee Users are those with the Draw Requester role and Draw Approver role. HUD users can view financial information, but approval actions are limited to those in the Drawdown Approval user group for a given Grant in DRGR. All other users have limited or no functionality/access to functions of the **Manage My Financials** module. See Chapter 5 for more information on Grantee and HUD user roles.

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

Grantee Users

Location	Subsection	Action
Search/Edit Obligation	A3/B1	Obligating Funds to an Activity (Not for TA Users)
Create a Voucher	C1	Creating a Voucher
Search/Maintain Vouchers	A3/C2	Searching and Viewing a Line Item
Search/Maintain Vouchers	C3	Cancelling a Voucher Line Item
Search/Maintain Vouchers	C4	Approving/Rejecting or Revoking a Voucher Line Item
Search/Maintain Vouchers	C5	Revising a Voucher Line Item

HUD Users

Location	Subsection	Action
Search/View Obligation	A3	
Search/Maintain Vouchers	A3/C2	Viewing a Voucher Line Item

A. Manage My Financials Module Access

The **Manage My Financials** module contains the main functionality to create/edit obligation, create/approve/revise vouchers, and the functionality to process program income receipts and accounts in DRGR. (See Chapter 25 for Program Income and Program Income Account discussions.) This Chapter covers functionality related to obligations and vouchers.

A1. Grantee | User Access

User Role: Draw Requester or Approver	**Menu Option:** Manage My Financials

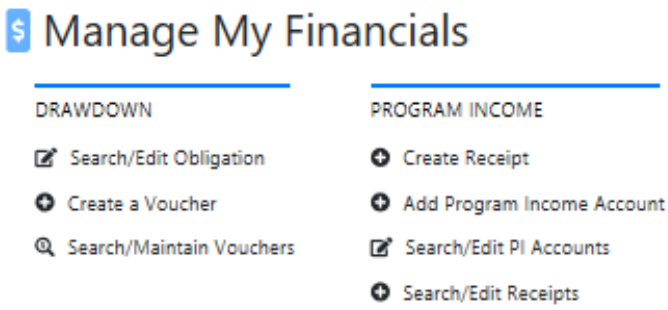
Purpose: Allow Grantee Users to access the **Manage My Financials** module.

Complete the following steps to access the Manage My Grants module:

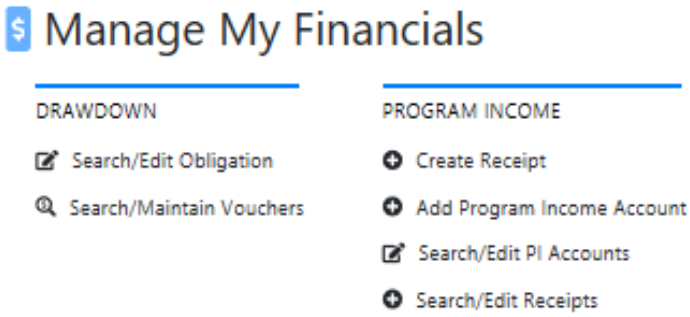
1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation menu.

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

Below are the **Manage My Financials** menus for a Grantee Draw Request User.



Below are the **Manage My Financials** menus for a Grantee Draw Approver User.



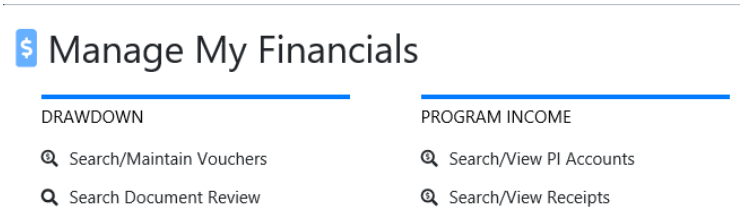
A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Financials
Purpose: Allow HUD Users to access the **Manage My Financials** module.	

Complete the following steps to access the Manage My Financials module:

1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation menu.

2 This opens the dropdown menu items for the **Manage My Financials** module. The DRGR System displays the relevant menu items based on user type and user roles. Below is the **Manage My Financials** menu for a HUD User with two sub-menus.



A3. HUD and Grantee| Search in Manage My Financials

User Role: Grantee and HUD User	**Menu Option:** Search/Edit Obligation Search/View Obligation Search/Maintain Vouchers
Purpose: Allow HUD and Grantee Users to search in the **Manage My Financials** module.	

Complete the following steps to access the Manage My Financials module:

1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. To complete the following actions, choose the appropriate functions:

Search for Obligations:

- Grantee Users: Select **<Search/Edit Obligations>**.
- HUD Users: Select **<Search/View Obligations>**.

Search for Vouchers:

- Grantee and HUD Users: Select **<Search/Maintain Vouchers>.**

2 Selecting the links above will take the user to a search page for obligations or for vouchers, as applicable.

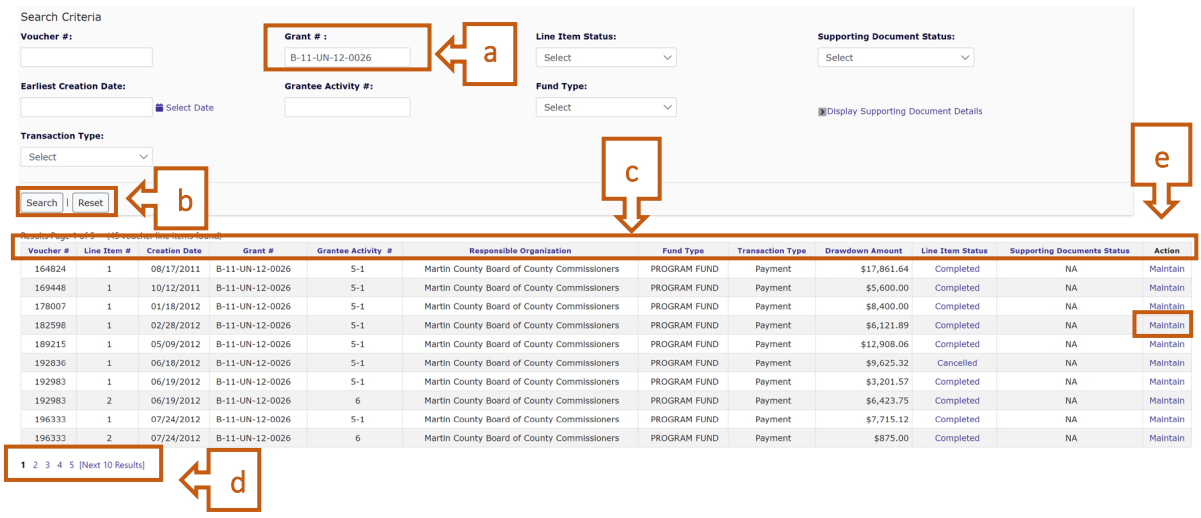
a) For obligations, the search function will default to the Grant selected in the top navigation bar. For vouchers, the Grant is not locked. Choose the correct Grant in the "Grant" field. A blank search with no further constraints will return all activities for that Grant with 10 results displayed per page in a table. The search can be constrained by using the search criteria. Search fields are not case sensitive.

b) Create a search by selecting the **<Search>** function. This action refreshes the page and populates a table below with results. To create a new search, select **<Reset>**.

c) The table headings are selectable to better sort the results. Choosing them repeatedly will switch between ascending and descending sort for the selected row.

d) Navigate between pages via the **<Page Number>** and **<Next Ten Results>** links at the bottom of the page.

e) In the Action column, select **<Maintain>** on the desired activity.



B. Maintain Obligations

Authorized Grantee Users can increase and decrease obligations for DRGR activities. Obligations are always done *at the activity level*, not for the Grant as a whole or the larger project level above the activity level. Obligation of funds is part of the DRGR math rules, and to create vouchers that draw funds, obligations are required. For TA Provider organizations, obligations automatically occur with HUD approval of TA work plans. The DRGR math rules apply to TA Provider organizations, however, the calculations are based on HUD approved TA work plan budgets.

TIP! Grantees are encouraged to consult with their CPD Representative to understand what does or does not constitute an obligation for a particular appropriation/grant.

Obligating funds to an activity generally means funds have been committed to that activity. The exact definition of "obligation" varies by appropriation. For some appropriations, entering into a written agreement would warrant an obligation in DRGR. Once the written agreement is in place, the Grantee can obligate the entire amount of the written agreement for that DRGR activity. Once the funds are obligated in DRGR, the Grantee can then create vouchers as needed to reimburse itself for expenses incurred while paying eligible activity expenses.

As part of the DRGR math rules, obligations fall between the activity budget level, and the activity draws. An activity obligation must be less than or equal to the amount budgeted, and greater than or equal to the cumulative amount drawn towards an activity. Funds available for drawdown cannot exceed the obligation amount, even if the budgeted amount for an activity exceeds the obligated amount.

TIP! Grantees are not required to obligate funds every time a voucher is ready to be created. Grantees can obligate funds to an activity far in advance of voucher creation if the Grantee has met the definition of an obligation.

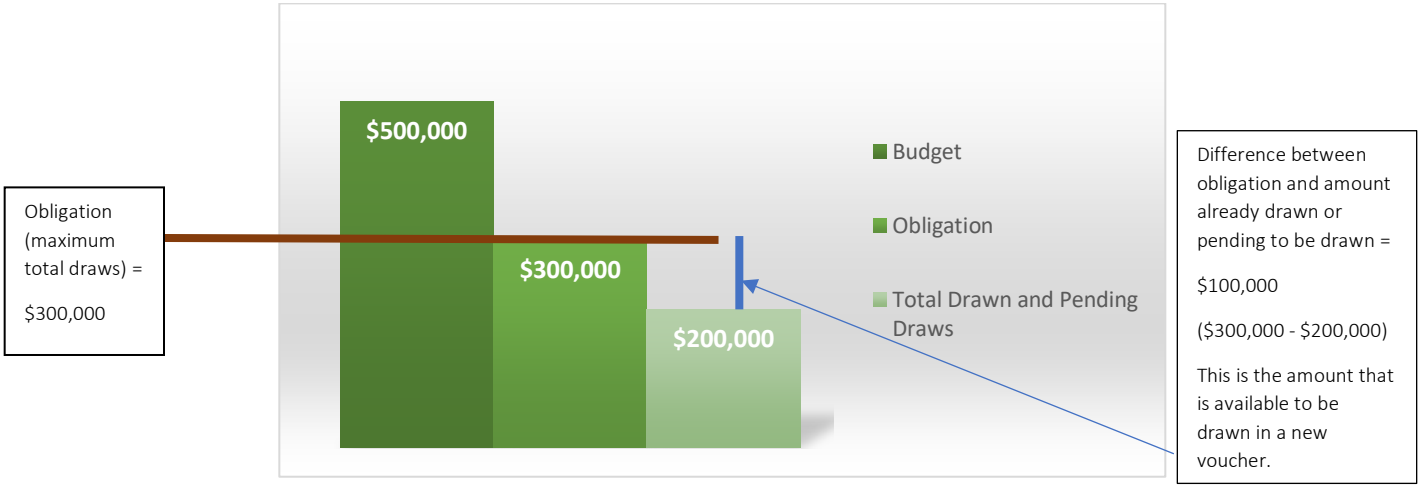
DRGR Math Rules

For example, if an activity budget is $500,000, and the obligation amount is $300,000, but the Grantee has $200,000 in draws and pending draws, then a Grantee can only draw up to $100,000 for that activity until the obligation is increased (not to exceed the budgeted amount). Additionally, the obligation could only be increased up to $500,000 at a maximum without increasing the activity budget.

TIP! Obligations should be made for both program (grant/federal) funds, AND program income. It is the total obligation of all Grant funds to that activity, not one single type of funds except in specific circumstances.

The remainder of this page intentionally left blank.

Example



B1. Grantee | Obligating Funds to an Activity (Not for TA Users)

User Role: Draw Requester or Approver	**Menu Item:** Search/Edit Obligation
Purpose: Allow Users to maintain (edit) obligations for activities and save those changes.	

Complete the following steps to maintain (edit) obligations

1. Search for an activity to obligate using the search steps in Section A3 above. The **"Activity Obligation - Add-Edit Obligation Line Item"** page will load.

2. On the **"Activity Obligation - Add-Edit Obligation Line Item"** page, below the summary information at the top of the page, a financial table is displayed, which provides some up-to-the-moment financial data for the selected activity. (See (a) below.) Financial data includes the following:

   Total Budget: This field displays the total amount budgeted to this activity. Users cannot obligate an amount greater than the amount that appears in this field. Remember that the activity budgets include both program (federal/Grant) funds and program income.

   Total Obligated Amount: This field displays the amount currently obligated for this activity.

   Available for Obligation: This field displays the amount available for obligation to this activity, which is equal to the Total Budget amount minus the Total Obligated Amount.

   Total Drawn Amount: This field displays the amount that has already been drawn down for this activity through vouchers, including both program (federal/Grant) fund draws, and program income draws. Remember that the obligation cannot be reduced below this amount.

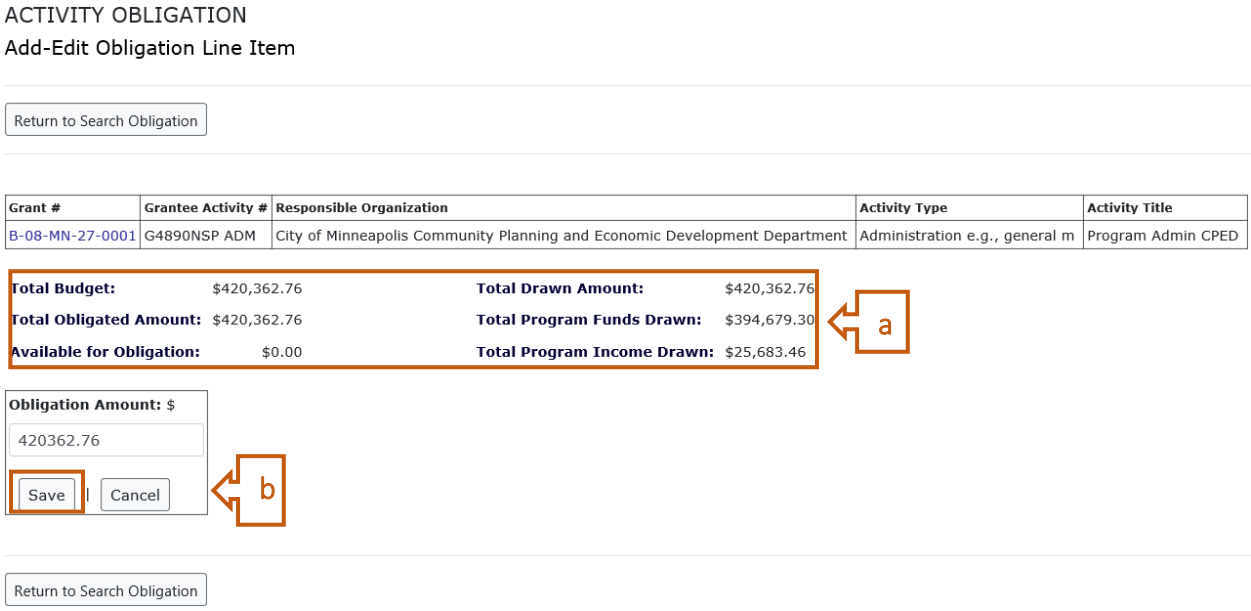
   Total Program Funds Drawn: This field displays the amount that has already been drawn down for this activity through vouchers for only program (federal/Grant) funds.

   Total Program Income Drawn: This field displays the amount that has already been drawn down for this activity through vouchers for only program income funds.

In the "Obligation Amount" field, adjust the obligation amount. (See (b) below.) To make a change, the new total amount obligated to this activity is entered. This is inclusive of, and cumulative with past obligations, so it is not an incremental entry. **If the current "Total Obligated Amount" reads $200,000, and the new obligation amount should be a total of $300,000, then enter $300,000. Do NOT enter $100,000.**

Select **<Save>**.

Any obligation entry must follow the DRGR math rules. The new obligation amount must be less than or equal to the "Total Budget" for the activity, and greater than or equal to the "Total Drawn Amount" for the activity.



C. Maintain Vouchers

The DRGR System uses vouchers to provide reimbursements for Grantees from program (Federal/Grant) funds (which is the Line of Credit provided by HUD via LOCCS) and to record Grantee uses of their program income. (See Chapter 25 for information on Program Income and Program Income Accounts.) A program (Federal/Grant) funds voucher is an electronic payment request that is sent from DRGR to LOCCS. Each line item on the voucher is a payment request for work performed, goods purchased, or some other expenditure for a specific activity (or TA work plan). A voucher might contain a single, or hundreds of individual line items depending on the size of the Grant and level of activity.

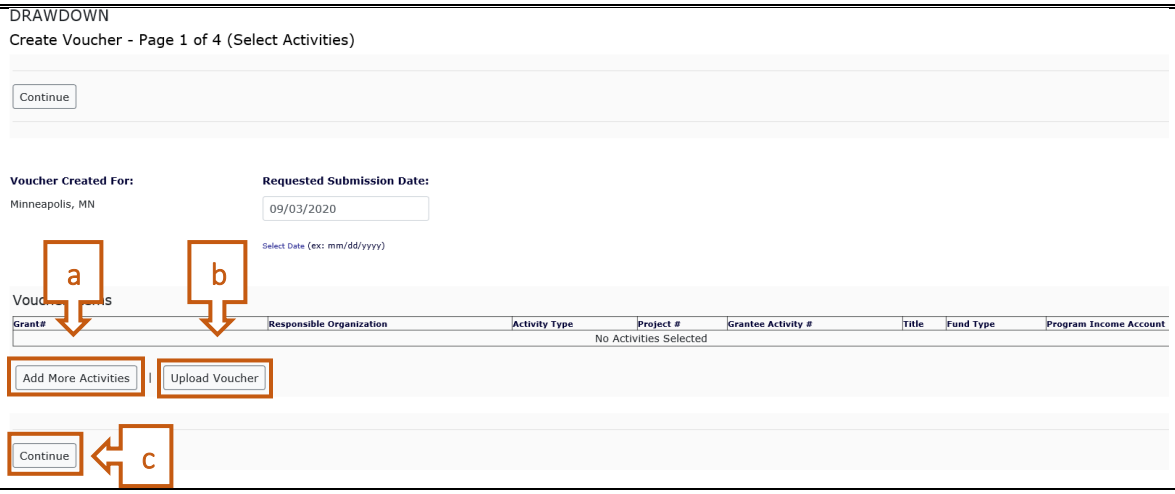
Each voucher line item identifies not only the Grant, Grantee, activity, and funding source, but also the specific amount requested (drawdown amount), submission date, and a line item status. The line item status is updated by DRGR as the voucher moves through the drawdown process.

A Grantee user with the Draw Requestor role must create a voucher and the following steps apply:

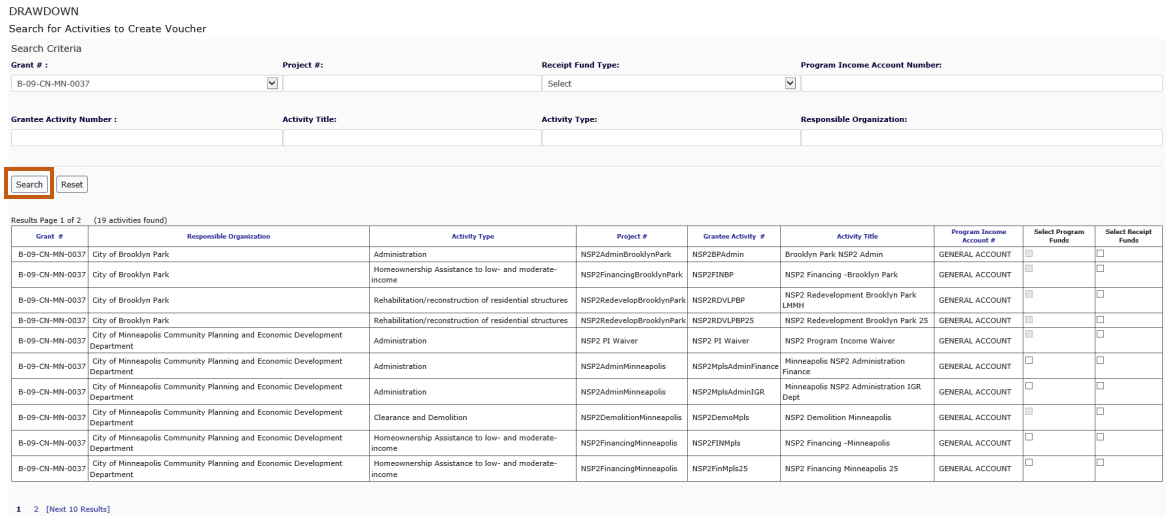
A Grantee User with the Draw Approver role must approve all new and revised vouchers in DRGR. After a voucher for program funds is created and approved in DRGR, it is submitted to LOCCS for processing. Once LOCCS processes a voucher, it authorizes disbursement of the funds for approved line items via wire transfer to the bank account provided by the Grantee during Grant setup.

C1. Grantee | Create a Voucher

User Role: Draw Requester	**Menu Item:** Create a Voucher
Purpose: Allow Grantee User with the Draw Request role to request reimbursement from program (federal/Grant) funds for eligible program expenses, and/or allow Grantee to record uses of funds in a program income account.	
✓ Complete the following steps to create a voucher containing one of more line items.	
1 Navigate to the **Manage My Financials** module. Locate the **Drawdown** menu. See Step A1 above. Users with the Draw Request role will see the link to **<Create a Voucher>**. Select this link and the **"Drawdown - Create Voucher Page 1 of 4 (Select Activities)"** page appears for the user to begin the four-step process to create a voucher in DRGR.	
2 On the **"Drawdown - Create Voucher Page 1 of 4 (Select Activities)"** page, the Grantee user may: • Select **<Add More Activities>** to add more activities to the voucher. The **"Drawdown - Search for Activities to Create Voucher"** page loads. (See (a) below.) • Upload financial data via the **<Upload Voucher>** link. (See (b) below and Chapter 34 on Data Uploads) • Remove voucher line items from the list of voucher line items. (See further below) • Continue to the next step of the voucher creation process. (See (c) below.) The user must select at least one activity (or TA work plan) to continue to page 2 of the create voucher process. Select the **<Add More Activities>** option to begin adding activities to the voucher (See (a) below.)	



3 On page 2 of the create voucher process – the **"Drawdown - Search for Activities to Create Voucher"** page – search for activities to add to the voucher as line items using the search criteria. Grant



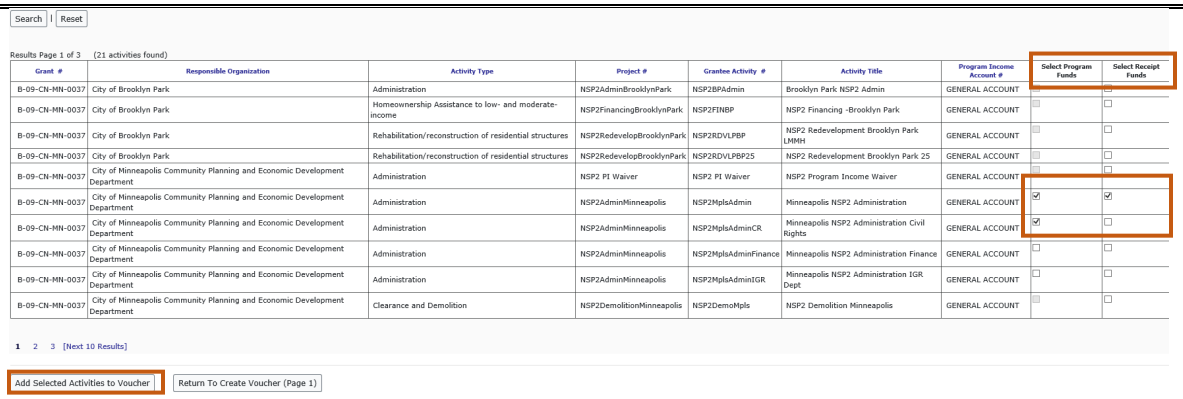
Grant #	Responsible Organization	Activity Type	Project #	Grantee Activity #	Activity Title	Program Income Account #	Select Program Funds	Select Receipt Funds
B-09-CN-MN-0037	City of Brooklyn Park	Administration	NSP2AdminBrooklynPark	NSP2BPAdmin	Brooklyn Park NSP2 Admin	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Homeownership Assistance to low- and moderate-income	NSP2FinancingBrooklynPark	NSP2FINBP	NSP2 Financing -Brooklyn Park	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Rehabilitation/reconstruction of residential structures	NSP2RedevelopBrooklynPark	NSP2RDVLPBP	NSP2 Redevelopment Brooklyn Park LMMH	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Rehabilitation/reconstruction of residential structures	NSP2RedevelopBrooklynPark	NSP2RDVLPBP25	NSP2 Redevelopment Brooklyn Park 25	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2 PI Waiver	NSP2 PI Waiver	NSP2 Program Income Waiver	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdminFinance	Minneapolis NSP2 Administration Finance	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdminIGR	Minneapolis NSP2 Administration IGR Dept	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Clearance and Demolition	NSP2DemolitionMinneapolis	NSP2DemoMpls	NSP2 Demolition Minneapolis	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Homeownership Assistance to low- and moderate-income	NSP2FinancingMinneapolis	NSP2FINMpls	NSP2 Financing -Minneapolis	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Homeownership Assistance to low- and moderate-income	NSP2FinancingMinneapolis	NSP2FinMpls25	NSP2 Financing Minneapolis 25	GENERAL ACCOUNT		

From the search result list of activities, select one or more checkboxes from the "Add Program Funds" and "Add Receipt Funds" columns.

TIP! For better search results please use the <reset> button (g) in between different searches.

- **Program Funds**: drawdown from program (HUD/treasury/Grant/federal) funds. A line item of this type will eventually result in a transfer from the Grant's LOCCS treasury account to the bank account provided by the Grantee.
- **Receipt Funds:** drawdown from program income (received/on-hand) funds. A line item of this type is a recordkeeping entry that should match a transfer the Grantee has made to reimburse themselves with their program income account for eligible expenses.

Select <**Add Selected Activities to Voucher**>.



Search | Reset

Results Page 1 of 3 (21 activities found)

Grant #	Responsible Organization	Activity Type	Project #	Grantee Activity #	Activity Title	Program Income Account #	Select Program Funds	Select Receipt Funds
B-09-CN-MN-0037	City of Brooklyn Park	Administration	NSP2AdminBrooklynPark	NSP2BPAdmin	Brooklyn Park NSP2 Admin	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Homeownership Assistance to low- and moderate-income	NSP2FinancingBrooklynPark	NSP2FINBP	NSP2 Financing -Brooklyn Park	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Rehabilitation/reconstruction of residential structures	NSP2RedevelopBrooklynPark	NSP2RDVLPBP	NSP2 Redevelopment Brooklyn Park LMMH	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Brooklyn Park	Rehabilitation/reconstruction of residential structures	NSP2RedevelopBrooklynPark	NSP2RDVLPBP25	NSP2 Redevelopment Brooklyn Park 25	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2 PI Waiver	NSP2 PI Waiver	NSP2 Program Income Waiver	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdmin	Minneapolis NSP2 Administration	GENERAL ACCOUNT	☑	☑
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdminCR	Minneapolis NSP2 Administration Civil Rights	GENERAL ACCOUNT	☑	
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdminFinance	Minneapolis NSP2 Administration Finance	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Administration	NSP2AdminMinneapolis	NSP2MplsAdminIGR	Minneapolis NSP2 Administration IGR Dept	GENERAL ACCOUNT		
B-09-CN-MN-0037	City of Minneapolis Community Planning and Economic Development Department	Clearance and Demolition	NSP2DemolitionMinneapolis	NSP2DemoMpls	NSP2 Demolition Minneapolis	GENERAL ACCOUNT		

1 2 3 [Next 10 Results]

Add Selected Activities to Voucher | Return To Create Voucher (Page 1)

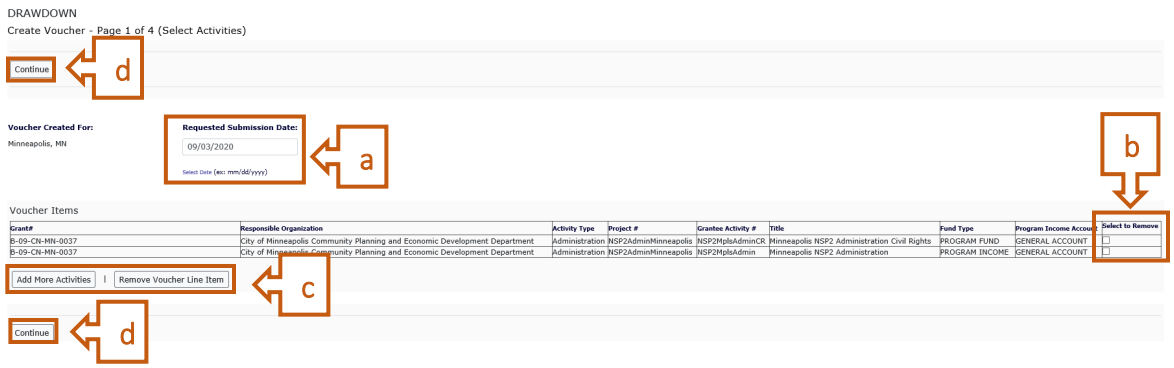
4 The System returns the user to the **"Drawdown - Create Voucher Page 1 of 4 (Select Activities)"** page populated with the selected activities. Double check the "Requested Submission Date" (See (a) below.) The submission date defaults to today but can be set up to 90 days in the future. It cannot be in the past. This will be the date the voucher is submitted to LOCCS (once approved).

TIP! Like all date fields in DRGR, the submission date must be entered in a MM/DD/YYYY format.

If a line item was added in error, the Grantee User can check boxes in the "Select to Remove" column and then select **<Remove Voucher Line Item>** (see (b) and (c) below).

Select the **<Add More Activities>** link again to add more activities (see (c) below).

Review the list of activities and fund types to confirm they are accurate. Select **<Continue>**. (See (d) below.) The **"Drawdown - Create Voucher Page 2 of 4 (Submit)"** page will load.



5 On the **"Drawdown - Create Voucher Page 2 of 4 (Submit)"** page, the "Available Amount" column contains the amount available for draws. You can select the hyper linked dollar values to view how the System calculated the available amount.

The formulas used to calculate the values in the "Available Amount" fields are:

- For Program Funds:
  - Obligated Amount –Total Drawn (PF+PI) – Pending Draws (PF+PI) – Balance of PI available in the PI account associated with this activity (or the general PI account if this activity is not associated with a PI account) = Amount Available

- For Program Income, the lesser of:
  - Obligated Amount –Total Drawn (PF+PI) – Pending Draws (PF+PI)
  - or; the balance of PI available in the PI account associated with this activity (or the general PI account if this activity is not associated with a PI account) = Amount Available

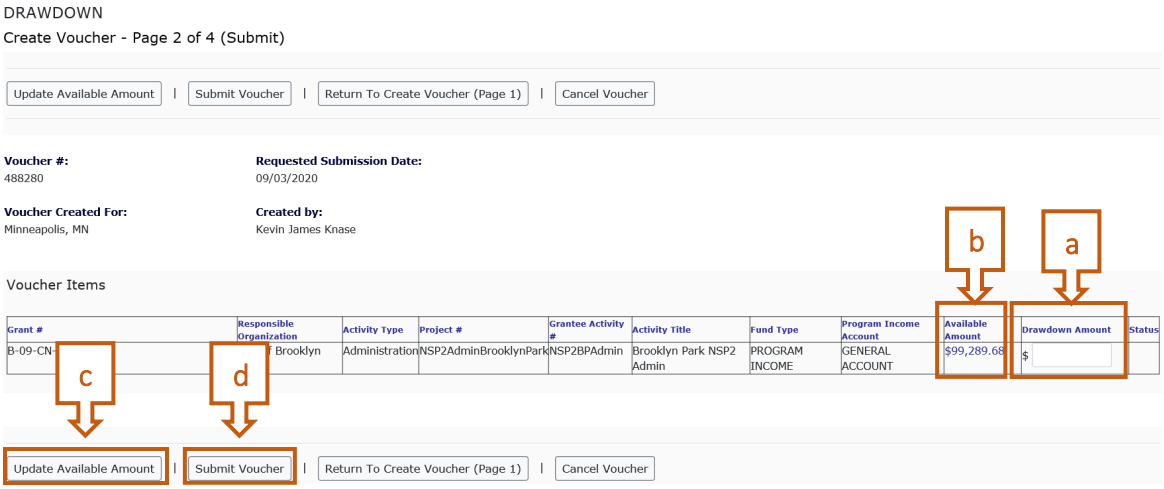
TIP! If the Available Amount is not sufficient for your draw, likely changes are needed to the obligations, budgets, or program income receipts/ accounts. Sometimes there are also previous pending draws that need resolution.

Enter the amounts desired into the "Drawdown Amount" column (see (a) below). This amount must be less than or equal to the amount in the "Amount Available" column (See (b) below.) Select **<Update Available Amount>** to see how the entries impact the "Available Amount" (See (c) below.)

If the Grantee User discovers that a line item is missing, select the **<Return to Create Voucher (Page1)>** link to add ore activities.

To cancel the voucher and start over, or if budget/obligation adjustments are needed before proceeding, select **<Cancel Voucher>**.

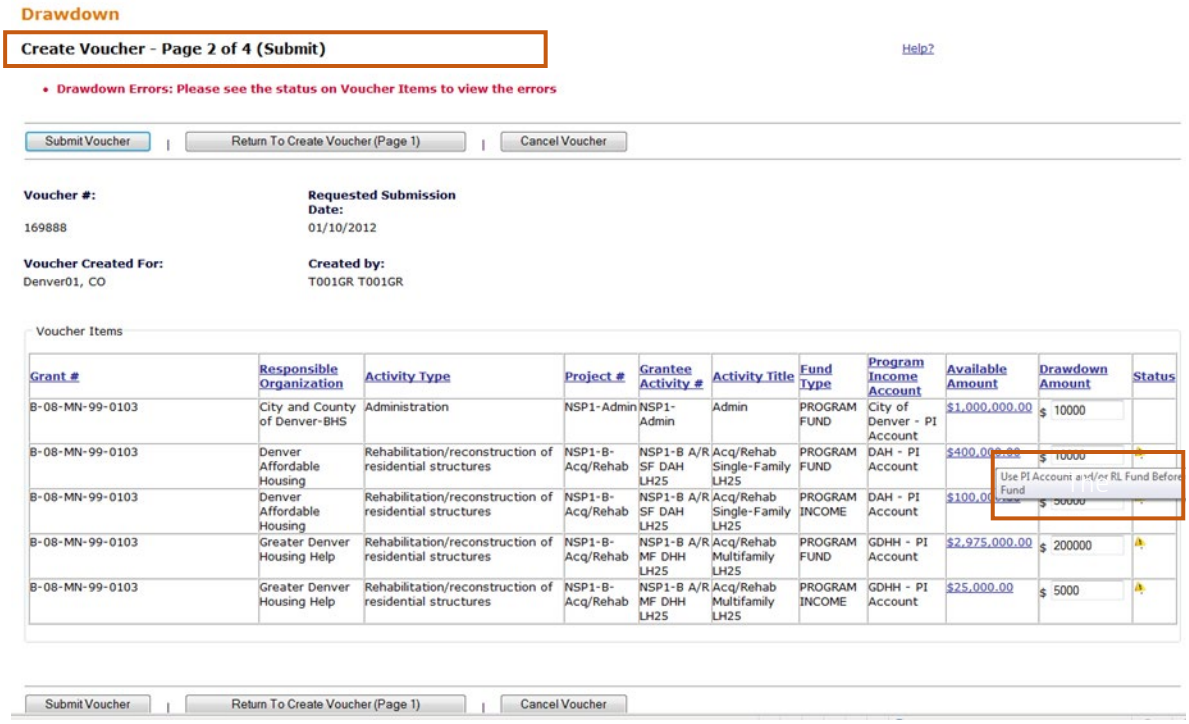
Once all information is confirmed to be correct, select **<Submit Voucher>** (See (d) below.) The **"Drawdown - Create Voucher Page 3 of 4 (Confirm)"** page will load.



TIP! Errors may occur if:

- the user entered an amount that exceeds the available amount. User may need to reduce drawdown amount, increase obligation, or increase activity budget.
- The user attempted to draw program funds before program income. In general, Program Income must be drawn before Program Funds. DRGR will show a message in the status column in addition to the error message at the top of the page. To show the message, hover the cursor over the "warning" icon.

In the following example, the user will need to draw Program Income before Program Funds.



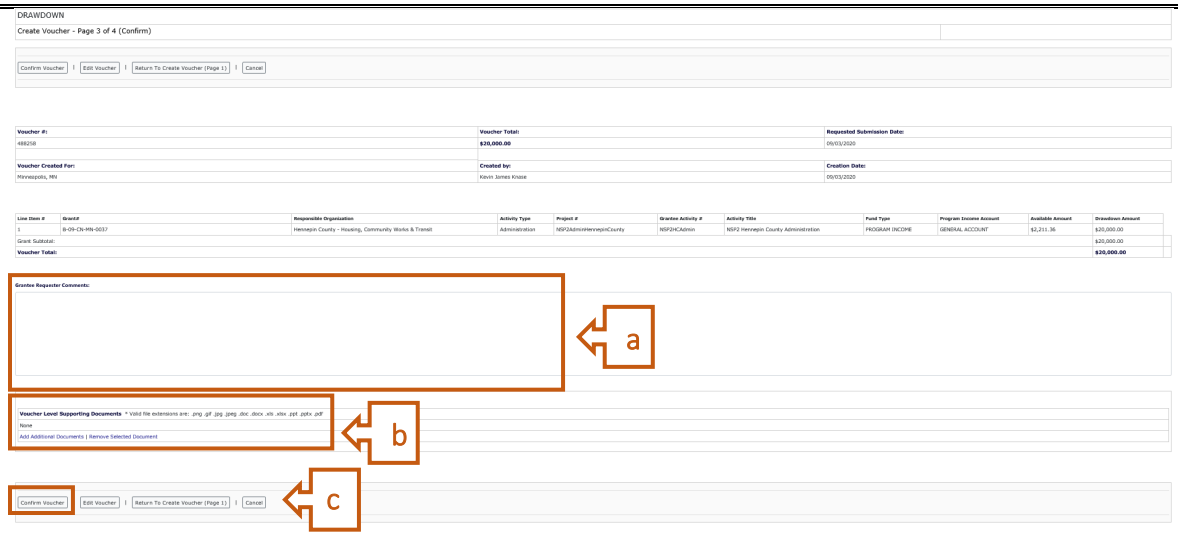
Grant #	Responsible Organization	Activity Type	Project #	Grantee Activity #	Activity Title	Fund Type	Program Income Account	Available Amount	Drawdown Amount	Status
B-08-MN-99-0103	City and County of Denver-BHS	Administration	NSP1-Admin	NSP1-Admin	Admin	PROGRAM FUND	City of Denver - PI Account	$1,000,000.00	$ 10000	
B-08-MN-99-0103	Denver Affordable Housing	Rehabilitation/reconstruction of residential structures	NSP1-B-Acq/Rehab	NSP1-B A/R SF DAH LH25	Acq/Rehab Single-Family LH25	PROGRAM FUND	DAH - PI Account	$400,000.00	$ 10000	
B-08-MN-99-0103	Denver Affordable Housing	Rehabilitation/reconstruction of residential structures	NSP1-B-Acq/Rehab	NSP1-B A/R SF DAH LH25	Acq/Rehab Single-Family LH25	PROGRAM INCOME	DAH - PI Account	$100,00	$ 50000	
B-08-MN-99-0103	Greater Denver Housing Help	Rehabilitation/reconstruction of residential structures	NSP1-B-Acq/Rehab	NSP1-B A/R MF DHH LH25	Acq/Rehab Multifamily LH25	PROGRAM FUND	GDHH - PI Account	$2,975,000.00	$ 200000	
B-08-MN-99-0103	Greater Denver Housing Help	Rehabilitation/reconstruction of residential structures	NSP1-B-Acq/Rehab	NSP1-B A/R MF DHH LH25	Acq/Rehab Multifamily LH25	PROGRAM INCOME	GDHH - PI Account	$25,000.00	$ 5000	

6 On the **"Drawdown - Create Voucher Page 3 of 4 (Confirm)"** page, users enter requester comments (See (a) below) on the voucher before final confirmation. The user approving the draw will be able to review these comments.

Users may also attach voucher level supporting documents to vouchers via this page (See (b) below.) Some appropriations only require supporting documents on vouchers over a certain threshold amount. This step is a Grantee's ONLY chance to attach supporting documents to the voucher unless HUD requests documentation be attached through DRGR. See Chapter 29 – Voucher Supporting Documents for more information. If the user proceeds past this step without adding the supporting documentation, they will no longer be able to attach them during the voucher creation process.

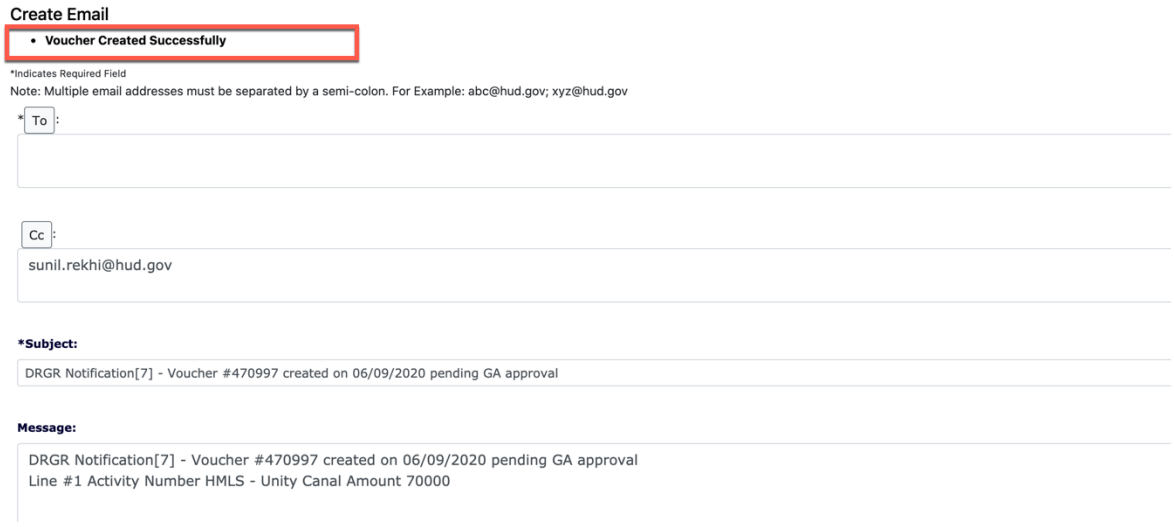
> TIP! Grantees are encouraged to consult with their CPD Representative to understand the specific rules for supporting documentation attachment for their appropriation/grant.
>
> When attaching supporting documentation, do not use special characters in file names as the files may not attach.

Review each of the drawdown amounts to verify that the proper amount for the correct fund type has been entered. Select **<Confirm Voucher>** (See (c) below.) The **"Drawdown - Create Voucher Page 4 of 4 (View)"** page will load.



7 On the **"Drawdown - Create Voucher Page 4 of 4 (View)"** page, users have the option of sending an email to alert others that the voucher was created. DRGR sends an email to all Grantee users that have Approve Drawdown privileges to notify them that a voucher has been created. This is a read-only confirmation page. Any line item that had a $0 dollar value in the Drawdown Amount field on Page 3 does not appear on this page. Check for a success message at the top of the page.

Users can download a printable PDF of successfully created vouchers for their records from this page.



C2. Grantee and HUD| View a Voucher Line Item

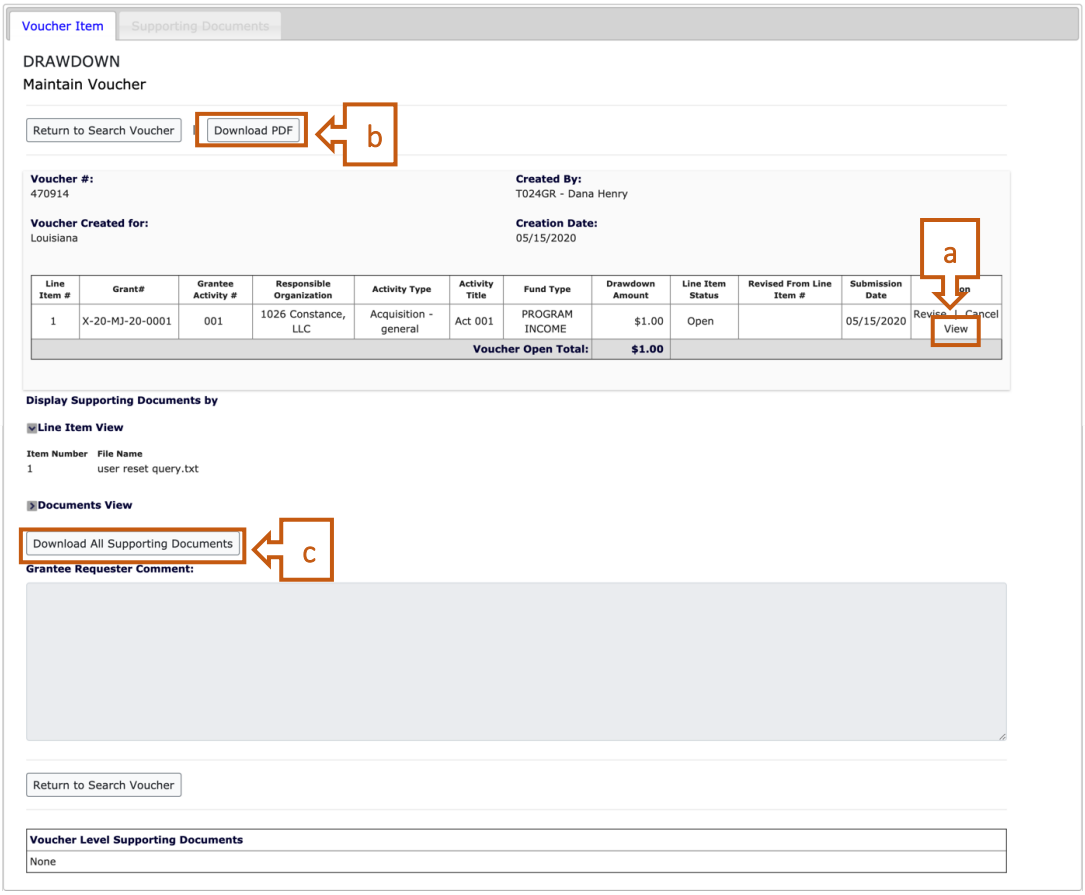
User Role: Grantee and HUD Users	**Menu Item:** Search/Maintain Vouchers
Purpose: Allow user to view a voucher line item and the associated voucher	

Complete the following steps to view a voucher line item

1 To search for a voucher to view, follow the steps in Section A3 above. The **"Maintain Voucher"** page will load. On the **"Maintain Voucher"** page, the entire voucher is displayed, not just the chosen voucher line item.

From this page the user can select several actions, designated by active links in the "Action" column. These links are dependent upon the status of the Voucher Line Item and the user's drawdown rights.

- Draw requesters will be able to cancel or revise voucher line items.
- Draw approvers will be able to reject/approve or revoke voucher line items.
- Both types of Grantee users, and HUD users will be able to:
  (a) view voucher line items,
  (b) download vouchers, and
  (c) download supporting documents.



The **<View>** link opens the **"View Voucher Line Item"** page. This page displays detailed information about the selected voucher line item.

An example of the "View Voucher Line Item" and a description of the information on the page is included as Appendix 1 of this Chapter.

C3. Grantee | Cancel a Voucher Line Item

User Role: Draw Requester	**Menu Item:** Search/Maintain Vouchers
Purpose: Allow Grantee draw requester to cancel a voucher line item that was erroneous or made in error.	

1 Follow the steps to search for a voucher in Section A3 above. The "**Maintain Voucher**" page will load.

TIP! On the "Drawdown-Search for Vouchers" page, a particularly useful search constraint is to search by "Line Item Status" or "Fund Type" (PF/PI)

2 On the **"Maintain Voucher"** page, the entire voucher is displayed, not just the chosen voucher line item.

Grantee Users with the Draw Requester role will be able to cancel or revise voucher line items. (See Section C5 of this Chapter for steps to revise vouchers.) If a voucher line item was created in error, and has a status of Open, Approved, Approved Pending HQ or Approved by HQ, then the Drawdown Requester can cancel the voucher. After a voucher line item has been cancelled, it still appears on the voucher; however, its status is "Cancelled", and no further actions can be performed on the line item.

TIP! The user cancelling the voucher line item does not have to be the same user as the one who created it but must have Draw Requester user rights.

Drawdown

Maintain Voucher

Help?

Only line items with a status of **Open**, **Approved**, **Approved Pending HQ**, or **Approved by HQ** can be cancelled.

Return to Search Voucher

Voucher #:
169651

Created By:
T001GR

Voucher Created for:
Denver1, CO

Creation Date:
08/23/2011

Line Item #	Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Available Amount	Drawdown Amount	Line Item Status	Submission Date	Action
1	B-08-DN-99-0013	NSP1-01 LB	City and County of Denver-BHS	Land Banking - Acquisition (NSP Only)	Land Banking	PROGRAM FUND	$6,000.00	$10,000.00	Approved	08/23/2011	Cancel | View
2	B-08-DN-99-0013	NSP1-03 Redevelopment	City and County of Denver-BHS	Construction of new housing	Redevelopment 525 California	PROGRAM INCOME	$20,000.00	$5,000.00	Approved	08/23/2011	Revise | Cancel View
3	B-08-DN-99-0013	NSP1-02 AR SF DAH	Denver Affordable Housing	Rehabilitation/reconstruction of residential structures	Acq/Rehab Single Fam Denver Affordable Housing	PROGRAM FUND	$67,000.00	$15,000.00	Approved	08/23/2011	Cancel | View
								Voucher Approved Total:	**$30,000.00**		

Return to Search Voucher

To cancel this item, select the **<Cancel>** link in the right "Action" column. Check to make sure you get a success message!

Drawdown

Maintain Voucher

Help?

- **Voucher line item cancelled successfully**

Return to Search Voucher

C4. Grantee | Approve/Reject or Revoking a Voucher Line Item

After a voucher is created and submitted by a Grantee User with Draw Requester rights, the voucher line items must be reviewed and approved by a Grantee User with Draw Approver rights. The Draw Approver may also reject the voucher line items and revoke approvals, if necessary. See the process steps in Section A above.

If a Program Income Funds line item is approved, then it stays 'Approved', as this is its final state. Only approved Program (federal/Grant) Funds voucher line items will be sent to LOCCS and result in funds being remitted to the Grantee.

If a line item is rejected by the Draw Approver, the line item remains on the voucher. However, the "line item status" is set to 'Rejected' and no further actions can be performed on the line item.

Any voucher line item still waiting for approval 90 days after the creation date is cancelled automatically by DRGR.

TIP! Drawdown Approvers have the option of approving or rejecting all line items in the voucher or approving or rejecting on a line item by line item basis.

TIP! The Grantee User approving a line item CANNOT be the same Grantee User that created the line item.

User Role: Draw Approver	**Menu Item:** Search/Maintain Vouchers
Purpose: Allow Grantee draw approver to approve/reject a voucher line item as appropriate. Voucher line item revocations will also be covered.	
1 Follow the steps to search for a voucher in Section A3 above. The **"Maintain Voucher"** page will load.	
2 On the **"Maintain Voucher"** page, the entire voucher is displayed, not just the chosen voucher line item. Grantee Users with Draw Approver rights can take the following steps when approving a voucher. (a) To view the details of a line item before approving or rejecting it, select the **<View>** link in the "Action" column next to the line item; after viewing it, select the **<Return to Maintain Voucher>** button. (b) Optional but Recommended: Enter a comment in the "Grantee Approver Comments" field. (c) Change the submission date for the voucher line item if necessary. The submission date specifies when the voucher will be submitted to LOCCS. The date can be entered manually in a MM/DD/YYYY format or selected using the pop-up calendar. The date cannot be after the activity block drawdown date, if applicable, see Chapter 14 of this User Manual regarding activity blocks. (d) Select the **<Approve>** or **<Reject>** link in the "Action" column next to a line item to approve or reject line items individually. Alternatively, select all (or multiple) line items using the checkboxes next to the line items and selecting the **<Approve Selected>** button or the **<Reject Selected>** button (see (a) below.)	

Maintain Voucher Help?

Return to Search Voucher | Download PDF

Voucher #: 169890

Created By: T001GR

Voucher Created for: Denver01, CO

Creation Date: 01/11/2012

Approve all line items at once

Approve, Reject, or View per line item

Select (All)	Line Item #	Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Submission Date	Action
✓	1	B-08-MN-99-0103	NSP1-Admin	City and County of Denver-BHS	Administration	Admin	PROGRAM FUND	$10,000.00	Open	01/11/2012 (mm/dd/yyyy)	Approve | Reject View
✓	2	B-08-MN-99-0103	NSP1-B A/R SF DAH LH25	Denver Affordable Housing	Rehabilitation/reconstruction of residential structures	Acq/Rehab Single-Family LH25	PROGRAM FUND	$25,000.00	Open	01/11/2012 (mm/dd/yyyy)	Approve | Reject View
✓	3	B-08-MN-99-0103	NSP1-B A/R SF DAH LH25	Denver Affordable Housing	Rehabilitation/reconstruction of residential structures	Acq/Rehab Single-Family LH25	PROGRAM INCOME	$100,000.00	Open	01/11/2012 (mm/dd/yyyy)	Approve | Reject View
✓	4	B-08-MN-99-0103	NSP1-B A/R MF DHH LH25	Greater Denver Housing Help	Rehabilitation/reconstruction of residential structures	Acq/Rehab Multifamily LH25	PROGRAM FUND	$10,000.00	Open	01/11/2012 (mm/dd/yyyy)	Approve | Reject View
✓	5	B-08-MN-99-0103	NSP1-B A/R MF DHH LH25	Greater Denver Housing Help	Rehabilitation/reconstruction of residential structures	Acq/Rehab Multifamily LH25	PROGRAM INCOME	$25,000.00	Open	01/11/2012 (mm/dd/yyyy)	Approve | Reject View
							Voucher Open Total:	$170,000.00			

a b c d

Grantee Approver Comments:

Approve Selected | Reject Selected | Submission Date

Voucher Comments:

Return to Search Voucher

This action refreshes the "**Maintain Voucher**" page with a message confirming the approval or rejection appears at the top of the page (see (e) below.) The status of the line item(s) is/are updated, and the line item(s) appear(s) in the group of line items with the same status. The submission date and any comments are now read-only.

Maintain Voucher

- **Voucher line item(s) approved successfully. Voucher approved total: $150,000.00.** e

Return to Search Voucher | Download PDF

Voucher #: 272833

Created By: T007GR - Rosalind Stevens

Voucher Created for: Chicago, IL

Creation Date: 03/07/2015

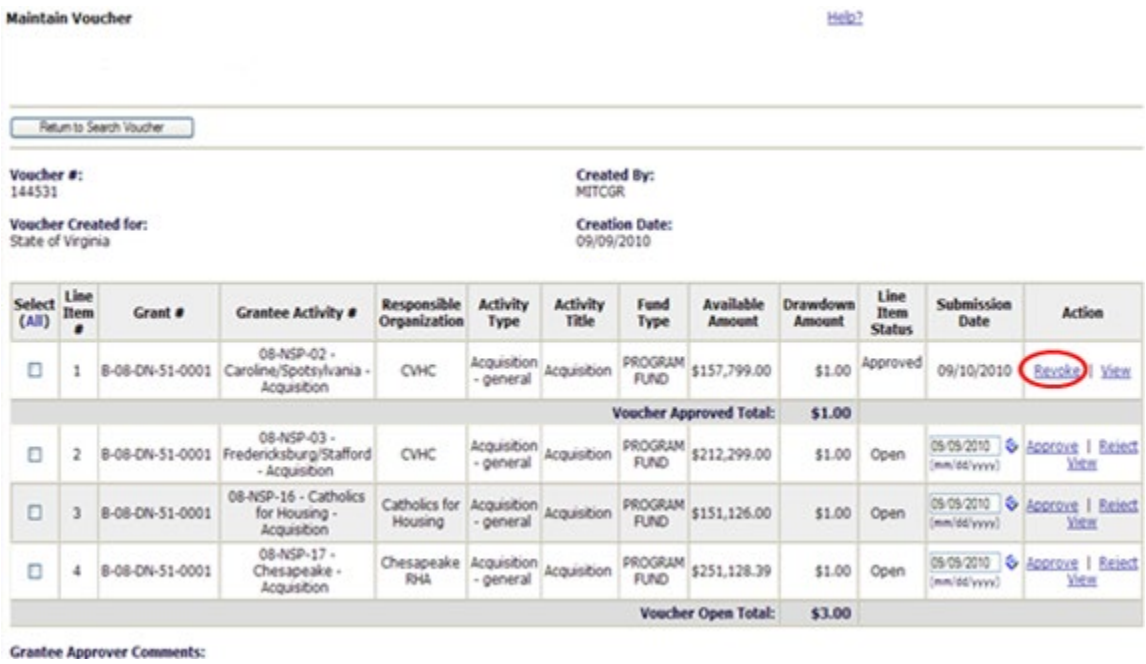
Select (All)	Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status
☐	1	B-13-MS-17-0001	Test2.1	Mercy Portfolio Services	Affordable Rental Housing	Test2.1	PROGRAM FUND	$100,000.00	Approved
☐	2	B-13-MS-17-0001	Test2.1	Mercy Portfolio Services	Affordable Rental Housing	Test2.1	PROGRAM INCOME	$50,000.00	Approved
						Voucher Approved Total:	$150,000.00		

3 From the "**Maintain Voucher"** page, Grantee Users with Draw Approver rights can also revoke approvals on voucher line items. If a voucher line item was approved in error, the Drawdown Approver can revoke the approval if the line item has not yet been submitted to LOCCS and has a status of Approved. After approval is revoked, the line item returns to the previous status of Open.

> TIP! Because Program Income voucher line items never move past the 'Approved' "Line Item Status", they can always have their approval revoked.

Only the Draw Approver who originally approved a voucher can revoke its approval. The links shown in the "Action" column will only display the **<Revoke>** link if the user has Draw Approver rights and approved the line item.

Select the **<Revoke>** link in the "Action" column next to the line item for which you want to revoke approval.



Maintain Voucher Help?

Return to Search Voucher

Voucher #: 144531

Created By: MITCGR

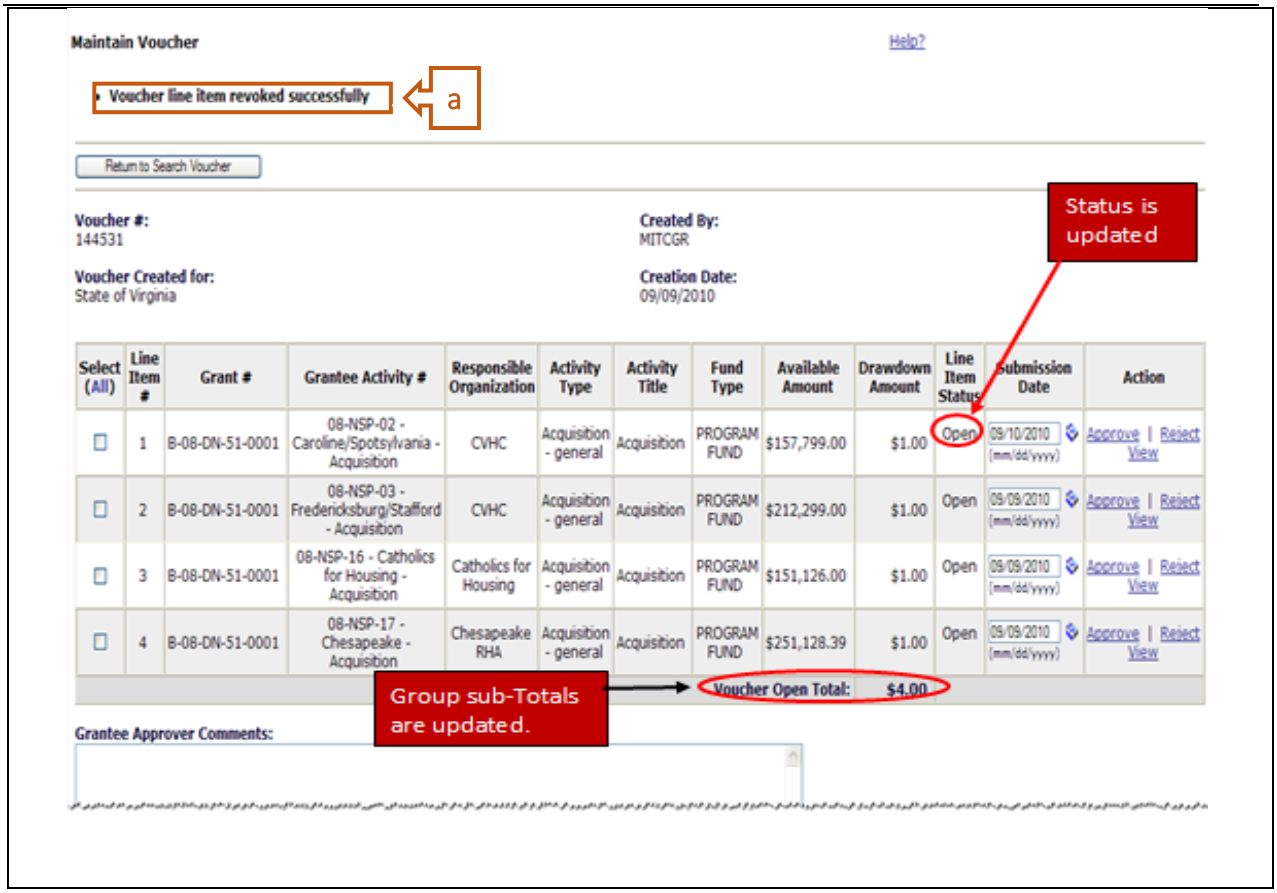
Voucher Created for: State of Virginia

Creation Date: 09/09/2010

Select (All)	Line Item #	Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Available Amount	Drawdown Amount	Line Item Status	Submission Date	Action
☐	1	B-08-DN-51-0001	08-NSP-02 - Caroline/Spotsylvania - Acquisition	CVHC	Acquisition - general	Acquisition	PROGRAM FUND	$157,799.00	$1.00	Approved	09/10/2010	Revoke | View
								Voucher Approved Total:	$1.00			
☐	2	B-08-DN-51-0001	08-NSP-03 - Fredericksburg/Stafford - Acquisition	CVHC	Acquisition - general	Acquisition	PROGRAM FUND	$212,299.00	$1.00	Open	09/09/2010 (mm/dd/yyyy)	Approve | Reject View
☐	3	B-08-DN-51-0001	08-NSP-16 - Catholics for Housing - Acquisition	Catholics for Housing	Acquisition - general	Acquisition	PROGRAM FUND	$151,126.00	$1.00	Open	09/09/2010 (mm/dd/yyyy)	Approve | Reject View
☐	4	B-08-DN-51-0001	08-NSP-17 - Chesapeake - Acquisition	Chesapeake RHA	Acquisition - general	Acquisition	PROGRAM FUND	$251,128.39	$1.00	Open	09/09/2010 (mm/dd/yyyy)	Approve | Reject View
								Voucher Open Total:	$3.00			

Grantee Approver Comments:

This action refreshes the **"Maintain Voucher"** page, with a message confirming the revocation at the top of the page (see (a) below). The status of the line item has been updated to "Open" and the line item appears in the group of line items with the "Open" status. The submission date and comments are now editable.



C5. Grantee | Revise a Voucher Line Item

Draw Requesters will be able to cancel or revise voucher line items. Revising a voucher line item is necessary when a disbursement needs to be moved from one activity to another (or to multiple activities). For example, a revision may be needed if funds were drawn in error for an activity. Another common scenario is rebalancing the amount drawn between two partner activities with different national objectives.

TIP! Grantees should consult with their HUD CPD Representative to determine whether a voucher should be revised or if the situation warrants the need to return funds to the U.S. Treasury.

Only Grantee Users with Draw Requester privileges can revise a voucher line item. The user can revise all or a portion of the original drawdown amount to a different activity or activities. In both situations, the following conditions also apply:

- Both activities must be part of the same Grant;
- The new activity(ies) must have enough funds obligated to allow the drawdown associated with the voucher revision;
- The activity(ies) to which the drawdown is being transferred must have a status of 'Underway' (not 'Cancelled', 'Planned', or 'Completed'); and
- The giving and receiving activities cannot be blocked. See Chapter 14 of this User Manual to learn more about activity blocks.

TIP! Voucher line items cannot be revised to reallocate funding to other Grants. This also applies to child Grants, if applicable. See Chapter 4 – Grants and Grantees for information on parent and child Grants.

You can revise the activity or dollar amount for a voucher line item that has a "Line Item Status" of 'Open' (not yet approved by Grantee approver) or that has a status of 'Completed' (paid by Treasury), but does not have a Transaction Type of Collection.

Several reasons may necessitate the need for voucher revisions, including:

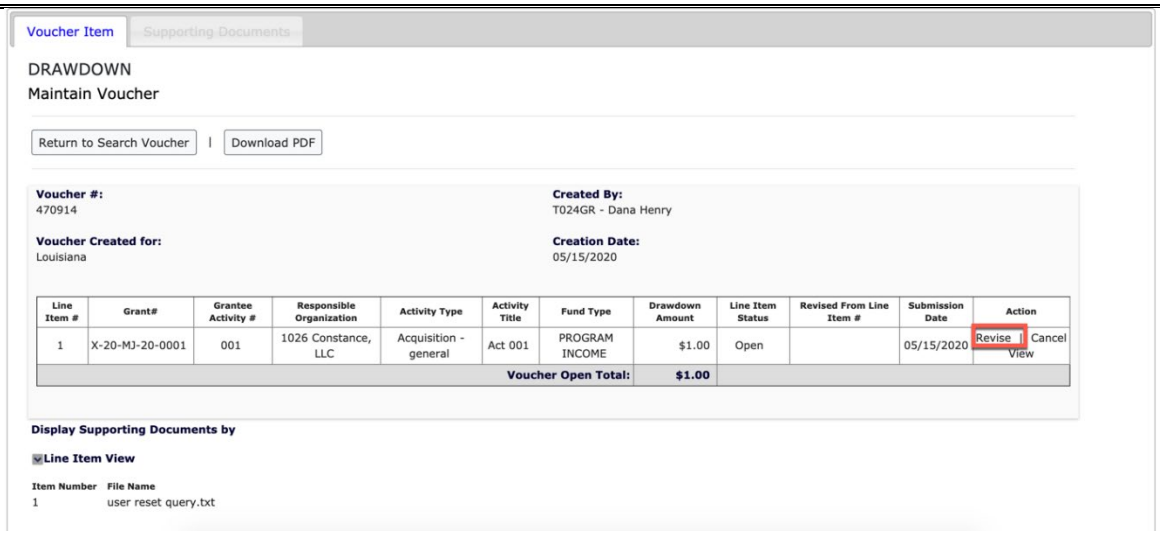
- The activity ID originally selected when the voucher was created is incorrect.
- The original voucher drew too much funding for one or more activities.
- The Grantee may have restructured the projects and activities in the Action Plan, necessitating the need to revise vouchers to the new activity(ies).
- The Grantee may have drawn funds against the wrong national objective (i.e. urgent need vs. low/mod or LMMI vs. LH25).
- The Grantee returned the funds to the U.S. Treasury. See Chapter 26 of this User Manual to learn more about handling funds that need to be returned to HUD.

Revising a voucher line item causes new line items to be created for that voucher. These new line items have a "Line Item Status" of 'Open'. There will be one or more-line items representing the amounts moved to one or more other activities, and a new line item for the remaining amount not moved from the original line item.

The original line item remains on the voucher, but its line item status is changed to 'Revised.' This revised voucher line item can no longer be edited unless the new voucher line items are not approved. Once revisions are approved by a Draw Approver, Line items with a Revised line item status no longer count towards the Total Drawn for an activity (unlike 'Completed' and 'Approved' draws).

TIP! The DRGR System does reserve room for line items with a transitory line item status such as Revised Pending Approval, Revision Pending Approval, Pending, Approved Pending HQ.

User Role: Draw Requester	**Menu Item:** Search/Maintain Vouchers
Purpose: Allow Grantee draw requester to revise a voucher line item by moving funds into one or more other line items.	
☑ Complete the following steps to revise a voucher line item	
1 Follow the steps to search for vouchers in Section A3 above. The **"Drawdown – Search for Vouchers"** page will load.	
2 On the **"Maintain Voucher"** page, the entire voucher is displayed, not just the chosen voucher line item. To revise a voucher line item, select **<Revise>** link from the Action column on the **"Maintain Voucher"** page for the desired line item. The **"Revise Voucher Line Item"** page loads.	



3 On the **"Revise Voucher Line Item"** page, follow the steps below to revise a voucher:

a) Select the activity for which funds are to be moved to from the **<Activity # / Activity Title / Available Amount>** drop-down list. Note: Only activities that are part of the same Grant and with an "Activity Status" of 'Underway' are listed.

b) Enter the amount of funds to be moved in the "Amount" field. The revision amount cannot exceed the Available Amount shown for the selected activity (a).

c) Select the **<Add Activity>** button if the user wishes to move funds to multiple activities. Repeat as needed until you have the appropriate number of new activities having funds moved into them. Remember any unmoved funds will be left in the original activity in a new line item at a reduce amount with whatever balance remains.

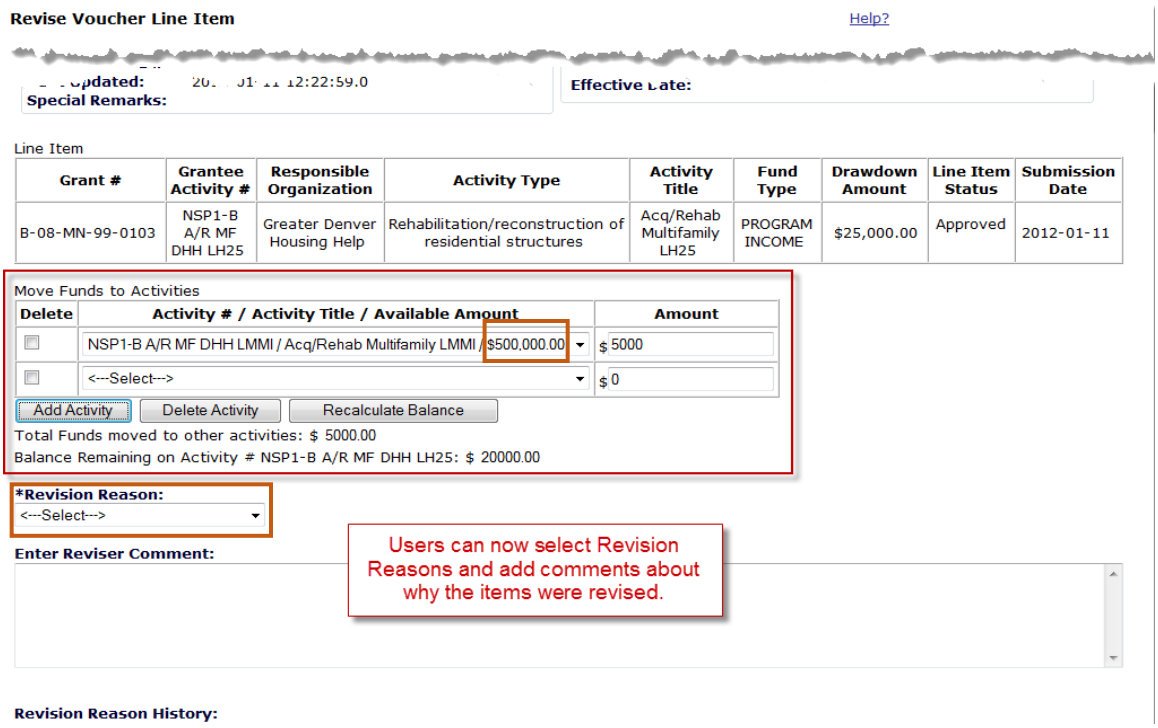
d) Select the **<Delete Activity>** button if the user wishes to delete an activity from the voucher revision.

e) Select the **<Recalculate Balance>** button to view the total funds proposed to be moved and balance remaining when factoring the proposed amount(s).

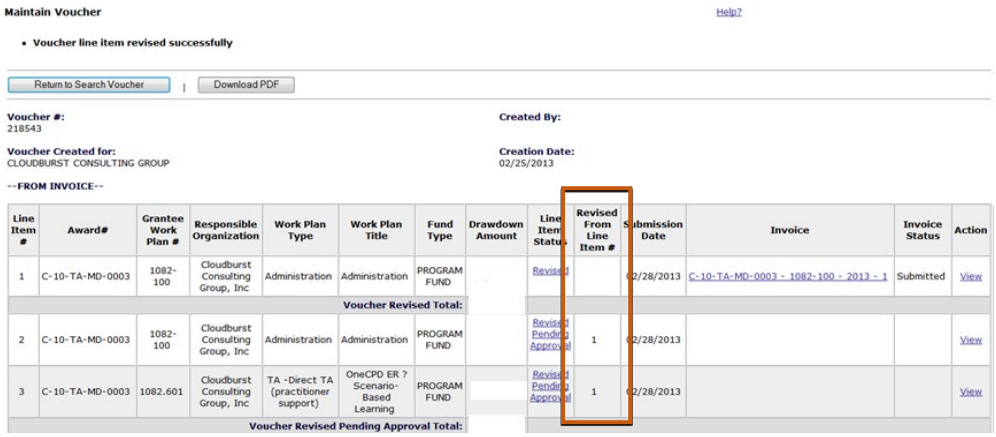
f) Select a 'Revision Reason' from the dropdown menu (b).

g) It is strongly recommended that the Grantee User enter a narrative in the "Enter Reviser Comment" field to explain the revision for an audit trail and recordkeeping purposes

h) Select the **<Save>** button at the bottom of the **"Revise Voucher Line Item"** page.



4 Selecting **<Save>** refreshes the **"Maintain Voucher"** page with the new line items added. The original line item (1) has a status of 'Revised.' Two new line items (2 and 3) have been added to the voucher. In addition, DRGR displays the line item number from where the revision(s) originated.



Appendix 1: View Voucher Line Item – Description of Information

An example of a **"View Voucher Line Item"** page and a table with additional information on the content follows:

DRAWDOWN
View Voucher Line Item

Return to Search Voucher | Return to Maintain Voucher

Voucher Created For: Louisiana
Voucher # / Line Item #: 470914 /1
Grant # : X-20-MJ-20-0001
Transaction Type: Payment
Created By: T024GR - Dana Henry
Creation Date: 05/15/2020

Grantee Requester Comments:

Voucher Level Supporting Documents
None

LOCCS Confirmation

DRGR Status: Open
Batch #:
Batch Date:
LOCCS Control #:
LOCCS Status: Blank
LOCCS Pay Code Description:
Batch Updated By: T024GR
Date Updated: 2020-05-15 11:00:15.0
Special Remarks:
Confirm Batch #:
Confirm Batch Date:
Confirmation Code:
Pay Method:
Payment Date:
Schedule #:
Reschedule:
Effective Date:

Line Item

Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Submission Date
X-20-MJ-20-0001	001	1026 Constance, LLC	Acquisition - general	Act 001	PROGRAM INCOME	$1.00	Open	2020-05-15

Supporting Documents

File Name
user reset query.txt

Revision Reason History:

Revision Comment History:

Grantee Approver Comments:
(None)

HQ Approver Comments:
(None)

Supporting Documentation History

Date:	Modification Type:	Modification:	Modified By:
05/15/2020	Document Added	user reset query.txt	T024GR Henry Dana

Return to Search Voucher | Return to Maintain Voucher

View Voucher Line Item Field Descriptions

Area	Field	Description	
DRGR Information	DRGR Status	The status of this voucher item:	
		Open	Initial status
		Approved	Voucher approved
		Pending	Voucher pending receipt by LOCCS
		Canceled	The Grantee canceled an Open voucher
		Completed	Voucher paid through LOCCS
		Revoked	Grantee revoked voucher approval
		Revised	Grantee revised HUD Activity Number drawing the funds from this voucher
	Batch #	The LOCCS batch number in which this line item was processed. If this field displays all zeroes, the drawdown request has not yet been sent to LOCCS.	
	Batch Date	The date that the batch was sent to LOCCS.	
	LOCCS Control #	A LOCCS-assigned number used to identify the voucher line item after being processed by LOCCS.	
	LOCCS Status	The status of this voucher in LOCCS: Voucher line item confirmation file currently processing (Open) Voucher line item pending confirmation by LOCCS Voucher line item approved by LOCCS Voucher line item rejected by LOCCS Voucher line item rejected by Treasury On hold Cancelled by LOCCS Voucher line item rescheduled by LOCCS	
LOCCS Update	Batch Updated By	Identifies LOCCS as the batch processor.	
	Date Updated	The date that the batch processing results were received from LOCCS.	
	Special Remarks	LOCCS-generated comments about voucher line items that needed special processing.	

Area	Field	Description
LOCCS Confirmation Information	Confirm Batch #	The LOCCS batch number in which this voucher line item was processed after it was received from the DRGR batch.
	Confirm Batch Date	The LOCCS batch date in which this voucher line item was processed after it was received from the DRGR batch.
	Confirmation Code	The LOCCS confirmation code for this batch: P00 Processed R01 Rejected, bad batch header R02 Rejected, batch count off R03 Rejected, batch total off R03 Rejected, RCD-BCH-NO does not equal batch R05 Rejected, out of sequence on RCD-NO R50 Rejected, invalid Grantee/Grant/program R51 Rejected, insufficient funds R52 Rejected, detail total does not equal voucher total R53 Rejected, out of sequence on voucher line number R54 Rejected, duplicate voucher number R55 Rejected, failed conversion edits R59 Rejected, other voucher lines failed edits R99 Rejected, missing required information H01 Held, missing payment information H02 Held, suspension H03 Held, funding problem
	Pay Method	Identifies method of payment (check or direct deposit).
	Payment Date	Date that the payment issued.
	Schedule #	Number used to identify payment.
	Reschedule	Identifies whether the payment was rescheduled.
	Effective Date	Identifies reschedule date.

Chapter 25: Program Income | Financial Module

Chapter 25: Program Income 1

A. Program Income Summary 1

A1. Program Income Receipts Overview 2

A2. Program Income Accounts Overview 2

B. Manage My Financials Module Access 3

B1. Grantee | User Access 3

B2. HUD | User Access 4

C. Manage Program Income Receipts 4

C1. Grantee | Add Program Income Receipt 4

C2. Grantee | Search and Edit Program Income Receipts 7

C3. Grantee | Associate Program Income Receipts 8

C4. HUD | Search and View Program Income Receipts 11

D. Managing Program Income Accounts 12

D1. Grantee | Add Program Income Accounts 12

D2. Grantee | Search and Edit Program Income Accounts 14

D3. HUD | Search and View Program Income Accounts 15

Chapter 25: Program Income

This Chapter provides procedures for adding, viewing, and editing Program Income Receipts and Program Income Accounts contained in the **Manage My Financials** module.

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

Grantee Users

Menu Option	Subsection	Action
Create Receipt	C1	Add a new Program Income Receipt
Search/Edit Receipts	C2	Search, view, and edit Program Income Receipts
Search/Edit Receipts	C3	Associate Program Income Receipts
Add Program Income Account	D1	Add a new Program Income Account
Search/Edit PI Accounts	D2	Search, view, and edit Program Income Accounts

HUD Users

Menu Option	Section	Action
Search/View Receipts	C4	Search and view Program Income Receipts
Search/View PI Accounts	D3	Search and view Program Income Accounts

A. Program Income Summary

If a Grantee generates Program Income (PI), they must track program income sources and uses in DRGR. Grantees should consult with their CPD Representative regarding what constitutes "Program Income" and if certain thresholds exist for reporting purposes (e.g., if cumulative annual receipts are less than $35,000, the Grantee may not be required to report Program Income).

Program Income is managed in DRGR by:

- DRGR users with Draw Request or Draw Approve roles – see Chapter 24 Financial: Overview and Roles
- Budgeting Program Income at the Action Plan, Project, and Activity Level – see Chapters 10 – 14 of this User Manual
- Creating Program Income Receipts, typically against the activity that generated the PI – see Section C.2 below.
- Drawing Program Income on Vouchers against the activity that expended the PI – see Chapter 24 Financial: Obligations and Vouchers

- Optional: Creating Program Income Accounts and RLF Accounts – see Section C.2 below.

A1. Program Income Receipts Overview

Reporting Program Income in DRGR

Grantees report PI received by creating PI Receipts in DRGR. Grantees must report all PI received in DRGR, including when:

- The Grantee or any subgrantees or subrecipients generate PI; and
- Subrecipients or subgrantees are permitted to retain PI generated and offset future program funds reimbursement requests. For example, if a subrecipient generated $10,000 of PI, and has eligible expenditures totaling $50,000, the subrecipient would submit a reimbursement request for $40,000 of Program Funds. In this scenario, the Grantee must create a PI Receipt for $10,000 and create a Voucher with two-line items: one line item to draw $10,000 in Program Income, and another line item to draw the $40,000 in Program Funds.

Associating Program Income Receipts

Grantees also have the option of associating PI receipts for tracking purposes if, for example, a subrecipient is allowed to retain 90 percent of PI generated to expend on eligible expenditures, with the remaining 10 percent returned to the Grantee. Since the subrecipient is allowed to retain PI generated, a Program Income Account must be created (see Section D.1. below). In this scenario, a PI receipt for 90 percent of the funds would be created for the activity that generated the PI (within the PI account) and a receipt for 10 percent of the funds would be created for the Grantee's administration activity (outside the PI account). The two receipts can then be "associated," using the process described below, to show the relationship between the two receipts.

A2. Program Income Accounts Overview

Program Income Accounts are used to "wall off" PI generated by a particular Responsible Organization. If, for example, a Grantee permitted a Grantee to retain PI to expend on other eligible uses in the Subrecipient Agreement, a PI Account would allow the Grantee to track PI generated and expended for that subrecipient ("Responsible Organization" in DRGR) from all other activities carried-out by the Grantee and other subrecipients. Failure to create a PI Account for the subrecipient described in the example would result in the DRGR System requiring the Grantee to draw PI generated by the subrecipient on another subrecipient's expenses. This is due to the following DRGR math rules, which are designed to require Grantees to drawdown PI before drawing additional Program Funds.

TIP! Program Income Accounts are optional in DRGR. If a Grantee requires a subrecipient to return all PI generated, then a PI Account should not be established for this subrecipient.

DRGR Math Rules

Total **Program Funds** Available to Drawdown from an Activity =

Obligated Amount

– (Total Approved and Pending Amount Drawn (PF + PI)

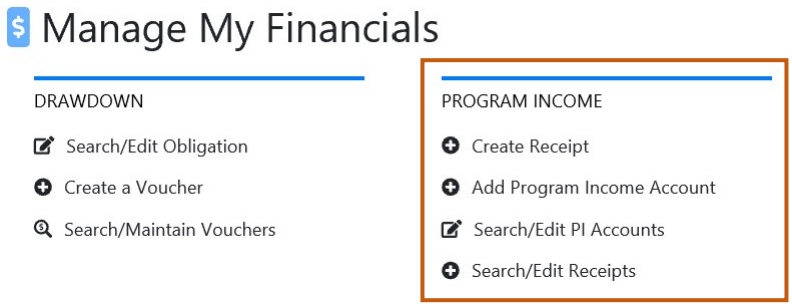
– PI Account Balance Available + Pending PI Draws for the PI Account

Drawdowns of PI generated by an activity in a PI Account can be created against the activity that generated the PI or other activities in the same PI Account. Any activities that are not assigned to a PI Account will remain in a "General PI Account." Regardless of whether an activity is assigned to a Grantee-created PI Account or whether the activity is in the General PI Account (unassigned), DRGR requires all PI received in each PI Account/General Account to be used before Program Funds are used.

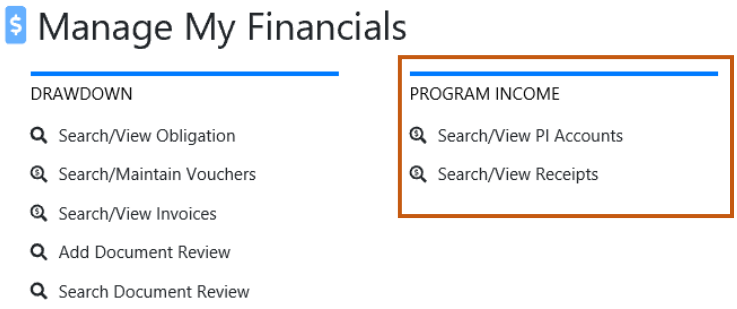
B. Manage My Financials Module Access

The **Manage My Financials** module contains all Program Income actions.

B1. Grantee | User Access

User Role: Grantee Drawdown Users	**Menu Option:** Financial Module
Purpose: Allow Grantee Users to access Program Income actions.	
Complete the following steps to acess the Manage My Financials Module:	
1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation bar.	
2 This opens the dropdown menu items for the **Manage My Financials** module. The System displays the relevant menu items based on user type and user roles. 	

B2. HUD | User Access

User Role: HUD Users	**Menu Option:** Financial Module
Purpose: Allow HUD Users to access Program Income actions.	
Complete the following steps to acess the Manage My Financials Module:	
1 In the DRGR System, select the **Manage My Financials** Module, or icon, located in the navigation bar.	
2 This opens up the dropdown menu items for the **Manage My Financials** module. The System displays the relevant menu items based on user type and user roles. 	

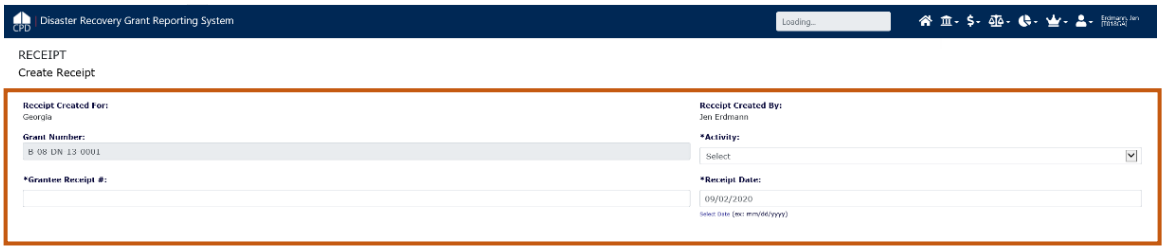
C. Manage Program Income Receipts

C1. Grantee | Add Program Income Receipt

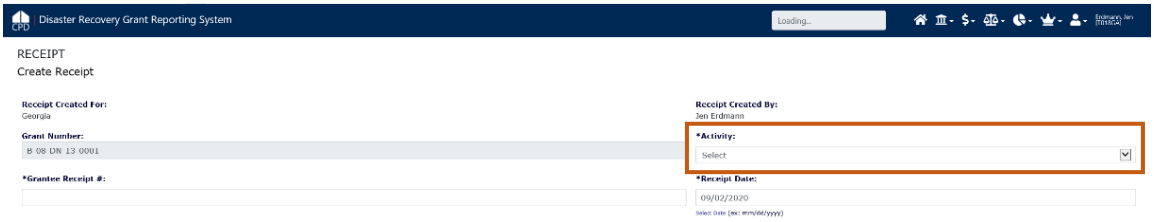
User Role: Draw Requester or Draw Approver	**Menu Option:** Create Receipt
Purpose: Allow Grantee Drawdown Users to add a Program Income Receipt.	
Complete the following steps to add a Program Income Receipt:	
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Create Receipt>**. The "Create Receipt" page will load.	

User Role: Draw Requester or Draw Approver	**Menu Option:** Create Receipt

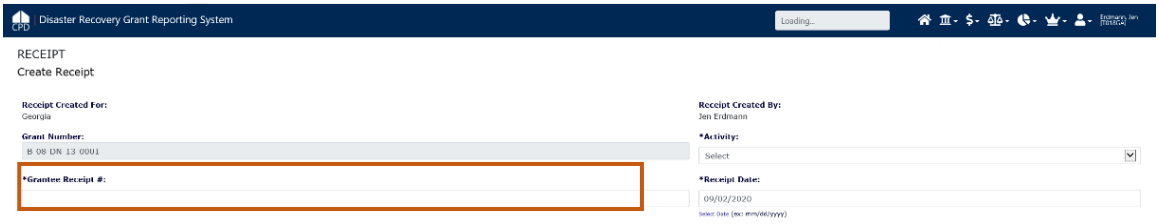
2 The appropriation and Grant will default to the selected Grant in the Navigation Bar. On the **"Create Receipt"** page, complete all fields marked with an asterisk (*).



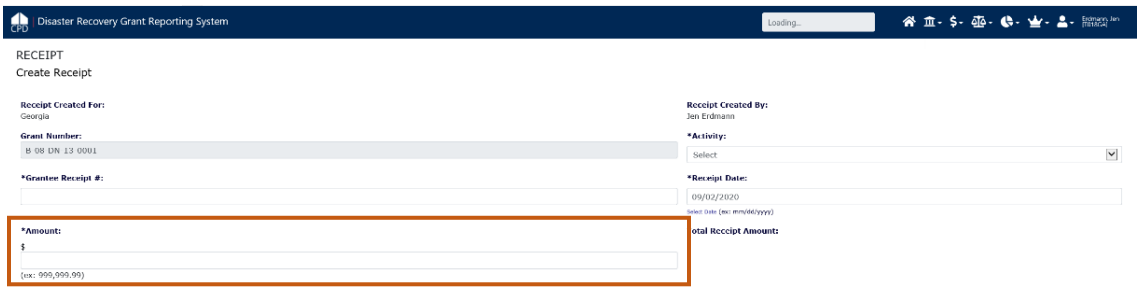
3 Select the desired "Activity" from the dropdown menu. Grantees may only select one "Activity" for each Program Income Receipt created.



4 Enter a "Grantee Receipt #". Grantees are encouraged to use a naming convention that is easily identifiable.

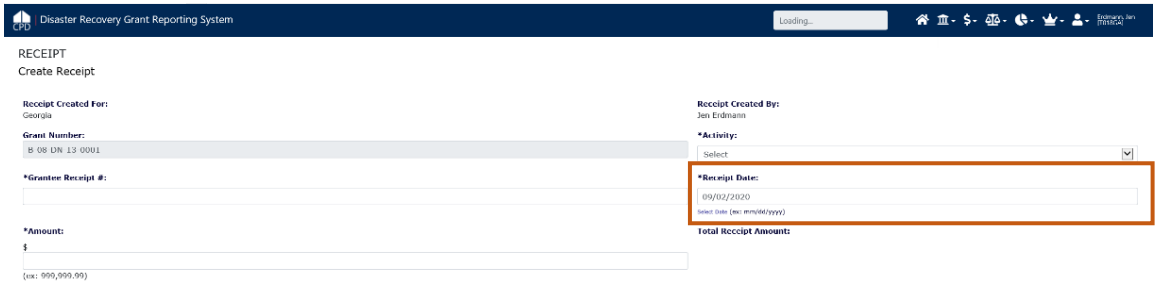


5 Enter the "Amount" of Program Income that was generated.

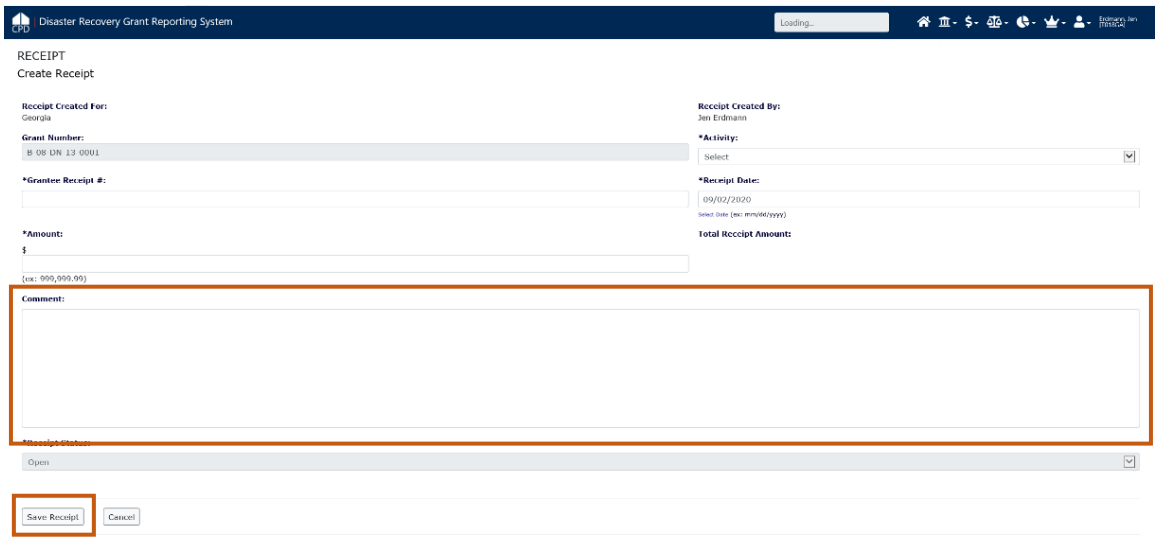


User Role: Draw Requester or Draw Approver	**Menu Option:** Create Receipt

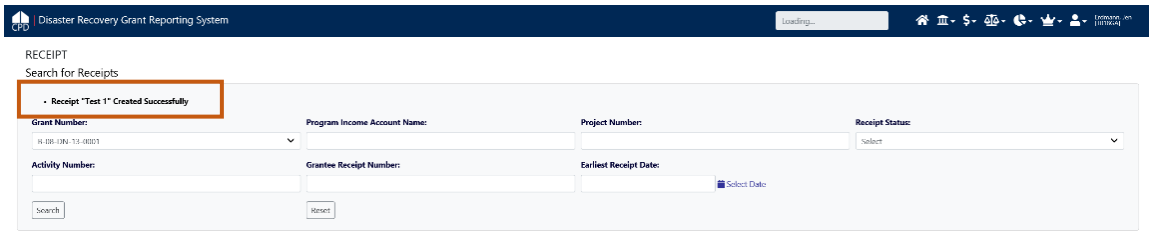
6 Enter the "Receipt Date" using the following format: MM/DD/YYYY, which should equal the date the PI was generated. The "Receipt Date" defaults to today's date. Any date prior to today's date will automatically generate an email to the Grantee's CPD Representative.



7 In the "Comment" field, enter a description of the Program Income generated (i.e. Sold 123 Main Street for $100,000) for tracking and recordkeeping purposes. When complete, select **<Save Receipt>**.



8 If successful, the **"Search/Edit Receipt"** page will load and display the message "Receipt Created Successfully".



C2. Grantee | Search and Edit Program Income Receipts

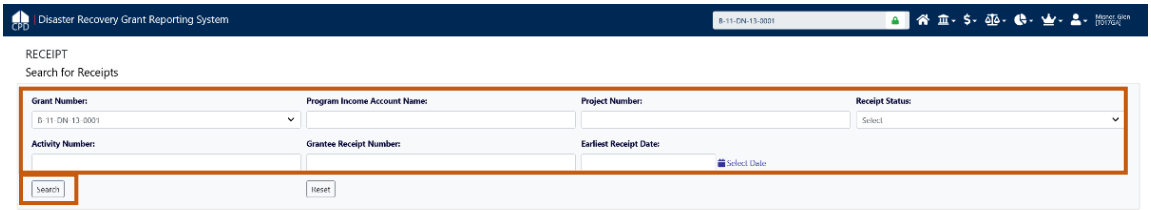
User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

Purpose: Allow Grantee Drawdown Users to search and edit a Program Income Receipt.

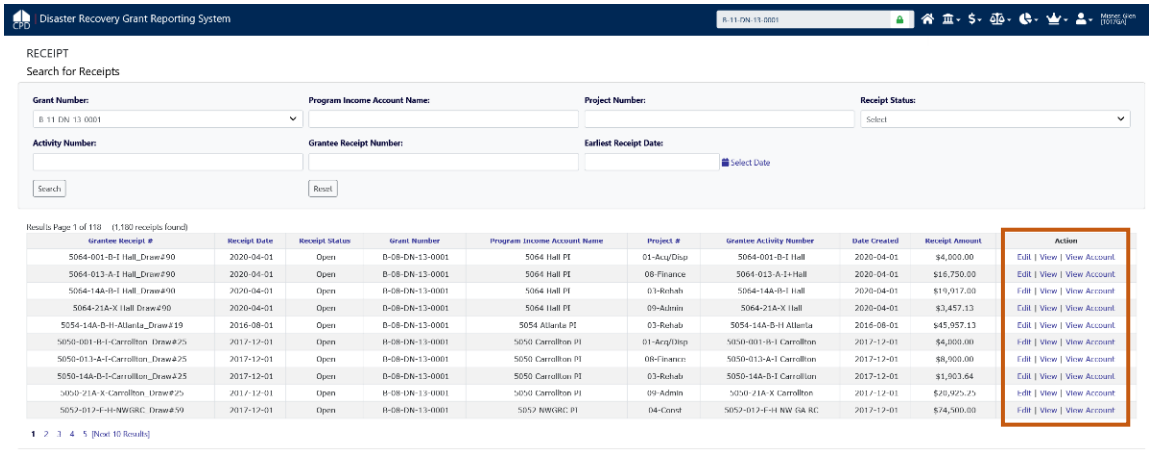
Complete the following steps to search and edit a Program Income Receipt:

1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Edit Receipts>**. The **"Search for Receipts"** page will load.

2 From the **"Search for Receipts"** page, select the desired "Grant Number" from the dropdown menu. Complete the remaining search criteria fields to narrow the search results. When complete, select **<Search>**.

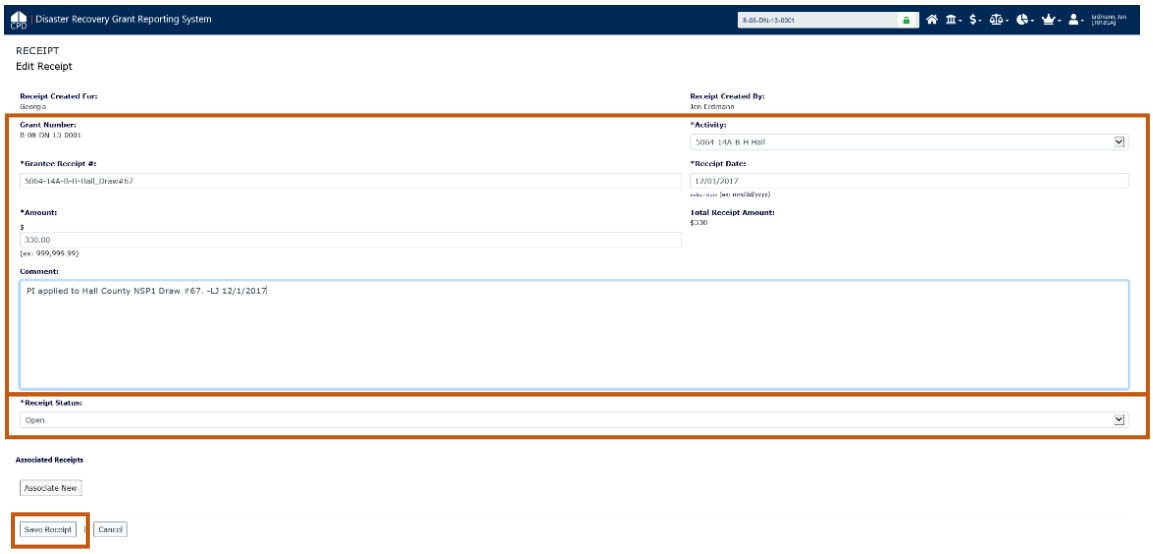


3 Select the **<Edit>** link under the "Action" column to edit the desired Program Income receipt. The **"Edit Receipt"** page will load.



User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

4 Edit the desired fields. It is important to note that a Grantee cannot reduce or cancel the receipt if some, or all, of the PI has been drawn on a voucher. Grantees may also change the "Receipt Status" to Cancel in order to remove the PI Receipt. When complete, select **<Save Receipt>.** DRGR will return the user to the **"Search/Edit Receipt"** page.



C3. Grantee | Associate Program Income Receipts

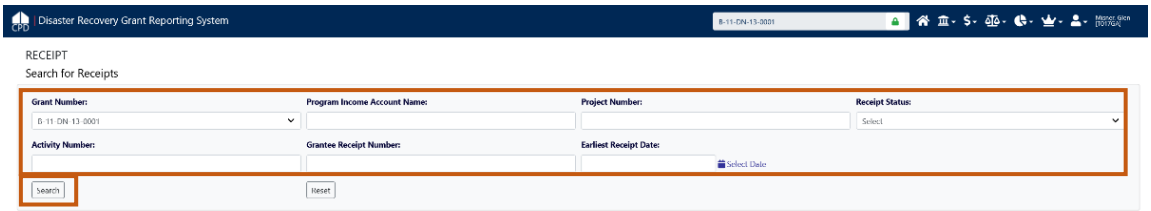
User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

Purpose: Allow Grantee Drawdown Users to associate Program Income Receipts.

Complete the following steps to associate Program Income Receipts:

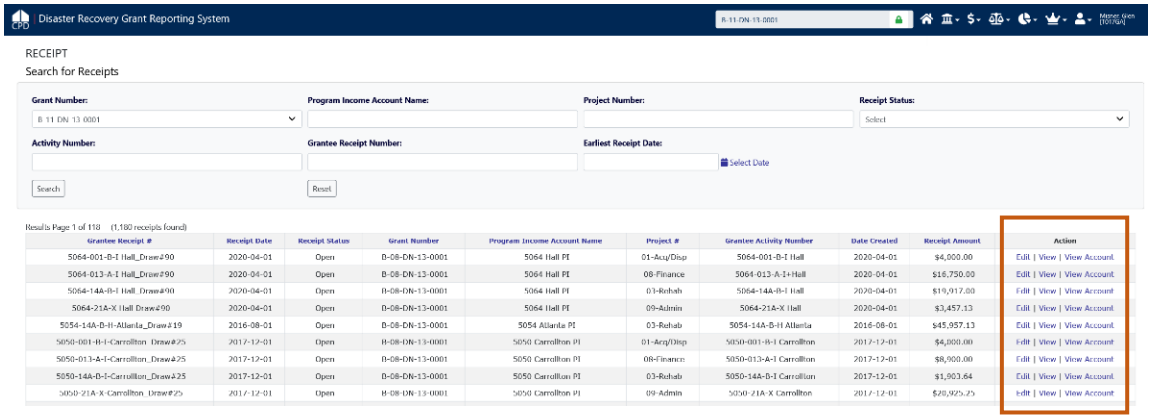
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Edit Receipts>**. The **"Search for Receipts"** page will load.

2 From the **"Search for Receipts"** page, select the desired "Grant Number" from the dropdown menu. Complete the remaining search criteria fields to narrow the search results. When complete, select the **<Search>** button.

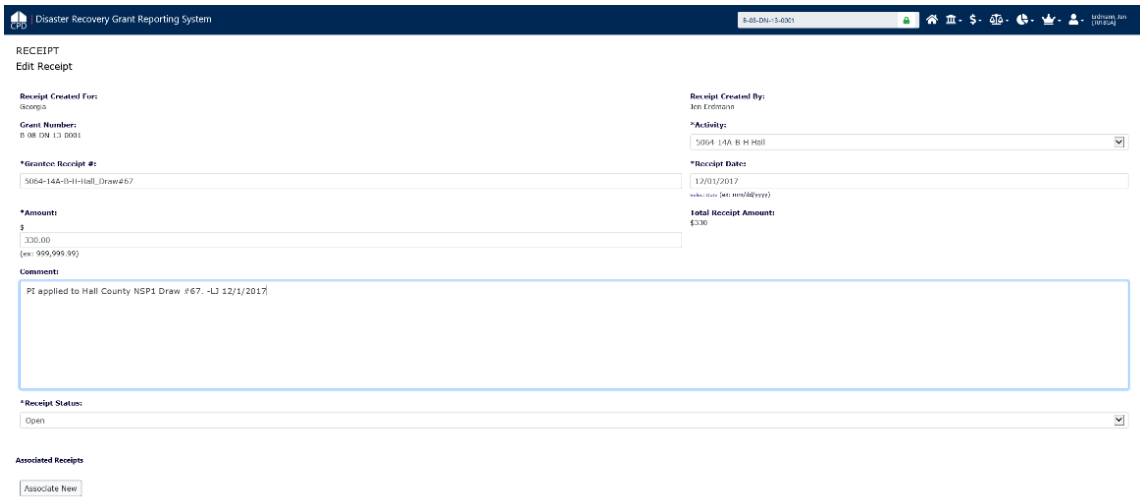


User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

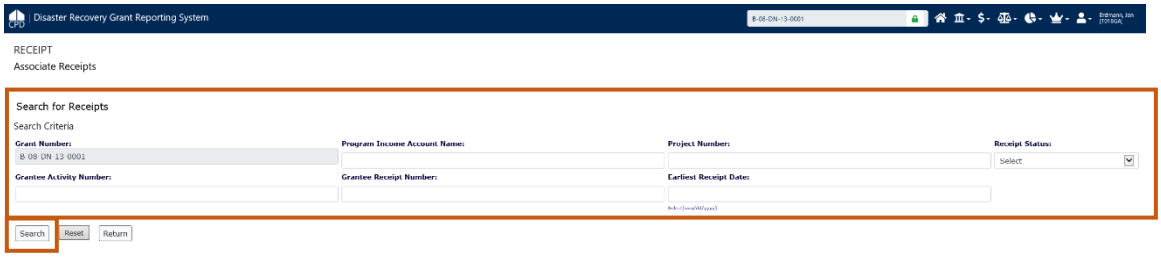
3 Select the **<Edit>** link under the "Action" column to edit the desired Program Income receipt. The **"Edit Receipt"** page will load.



4 Select **<Associate New>** to load the **"Associate Receipts"** page.

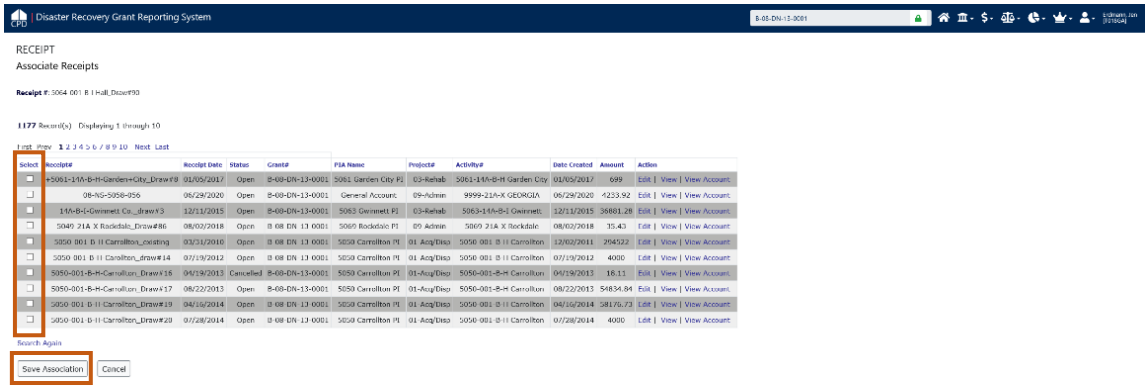


5 Use the search criteria to locate the desired receipt. When complete, select **<Search>.**

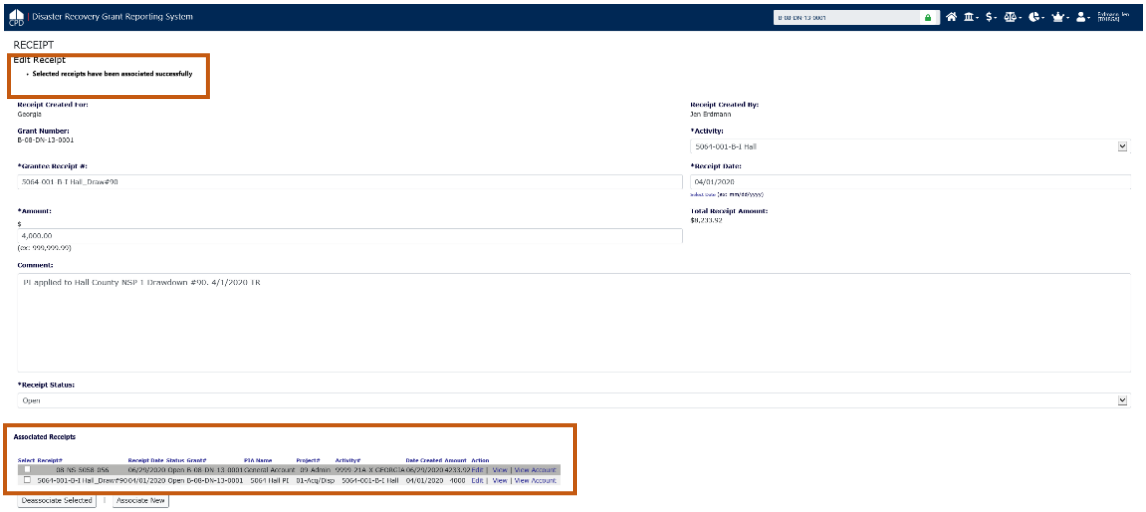


User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

6 The **"Associate Receipts"** page will refresh and display the search results. Users can select one or more Program Income receipts to associate with the receipt being edited. Once complete, select the **<Save Association>** button.

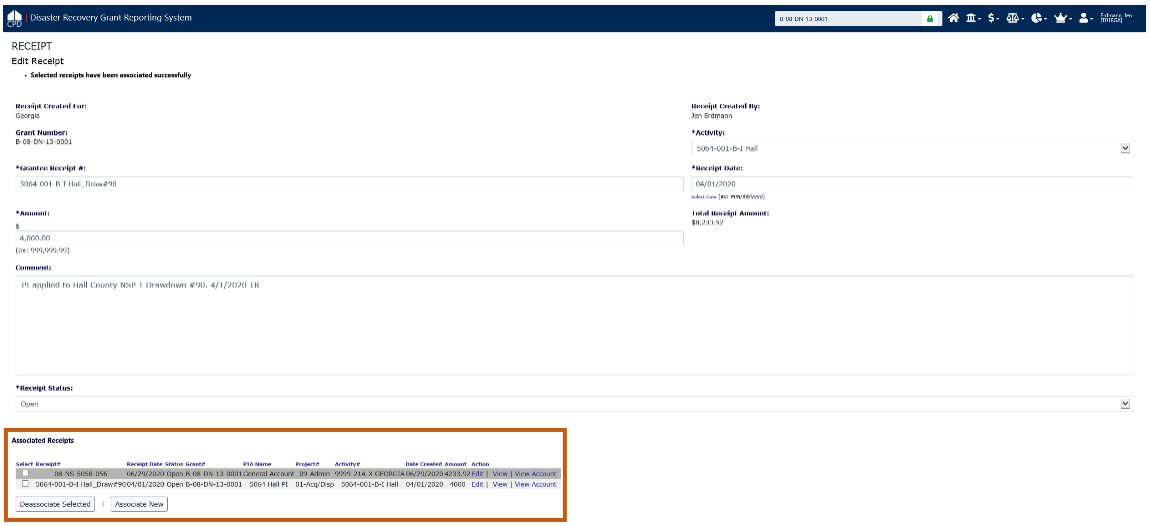


7 If successful, the **"Edit Receipt"** page will load and display the following message: "Selected receipts have been associated successfully." The associated receipts will also be shown under the "Associated Receipts" heading.



User Role: Draw Requester or Draw Approver	**Menu Option:** Search/Edit Receipts

8 Users can disassociate receipts by selecting the desired receipt using the checkboxes followed by selecting the **<Disassociate Selected>** button. Additional Program Income receipts may be associated using the **<Associate New>** button.



C4. HUD | Search and View Program Income Receipts

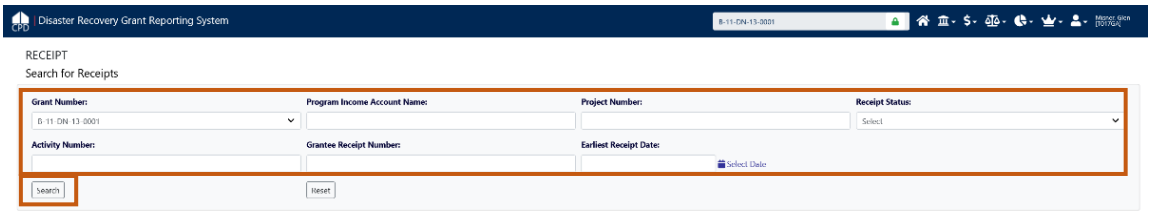
User Role: HUD User	**Menu Option:** Search/View Receipts

Purpose: Allow HUD Users to search and view Program Income Receipts.

Complete the following steps to search and view Program Income Receipts:

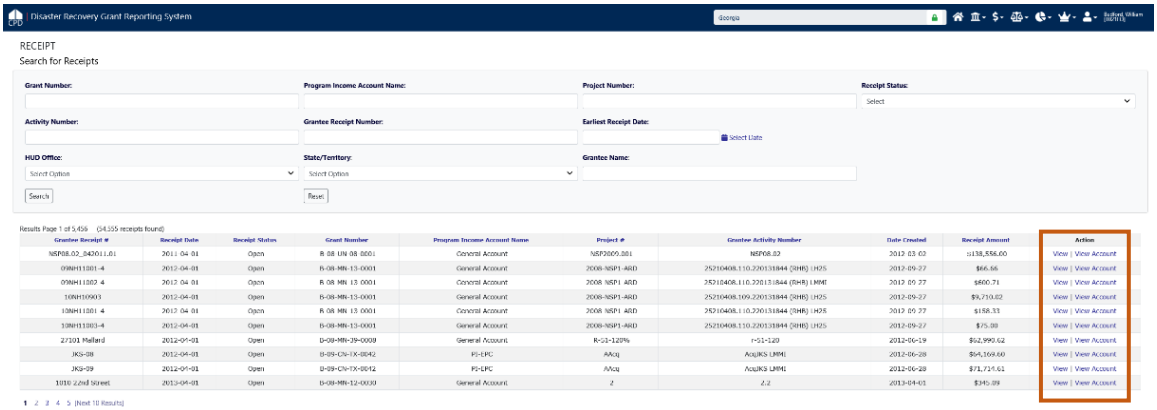
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Edit Receipts>**. The **"Search for Receipts"** page will load.

2 From the **"Search for Receipts"** page, select the desired "Grant Number" from the dropdown menu. Complete the remaining search criteria fields to narrow the search results. When complete, select the **<Search>** button.



3 Select the **<View>** link under the "Action" column to view the desired Program Income receipt. The **"View Receipt"** page will load.

User Role: HUD User	**Menu Option:** Search/View Receipts



D. Managing Program Income Accounts

D1. Grantee | Add Program Income Accounts

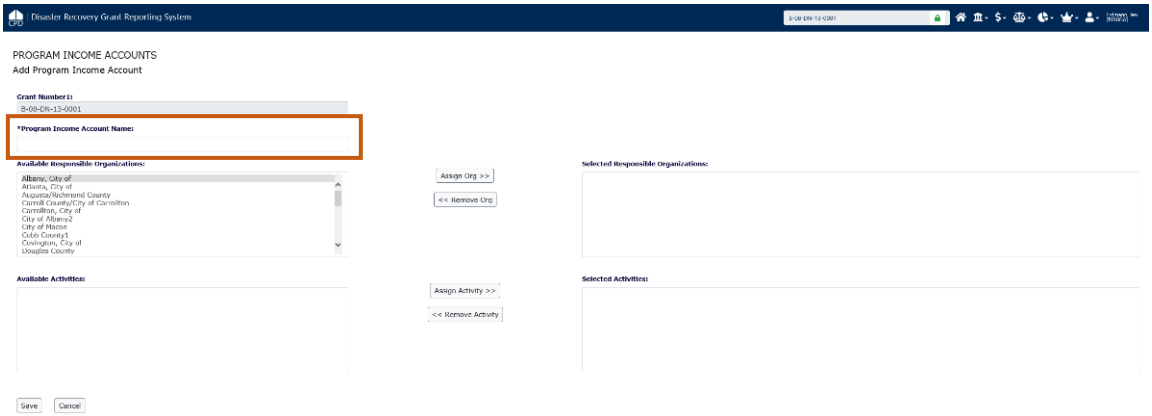
User Role: Draw Requestor and Draw Approver	**Menu Option:** Add Program Income Account

Purpose: Allow Grantee Drawdown Users to add a Program Income Account.

Complete the following steps to add a Program Income Account:

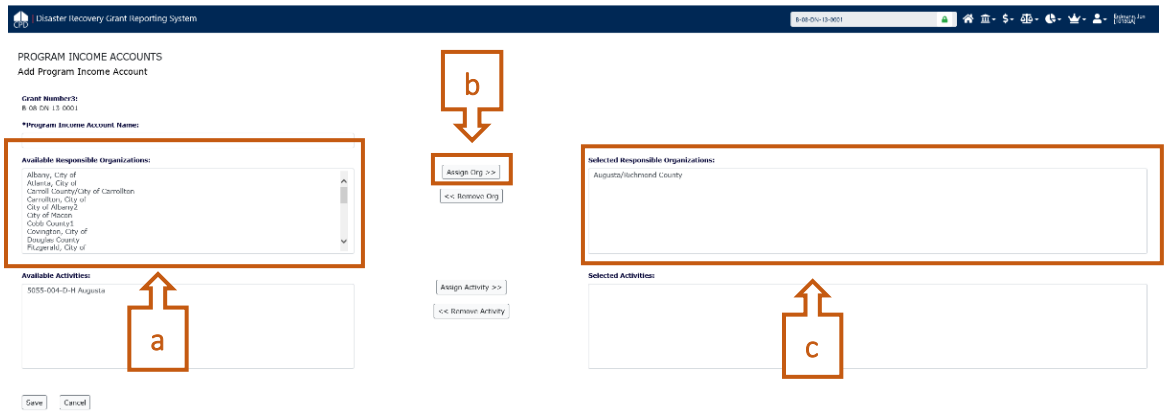
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Add Program Income Account>**. The **"Add Program Income Account"** page will load.

2 The appropriation and Grant will default to the selected Grant in the Navigation Bar. On the "Add Program Income Account," enter a "Program Income Account Name" field.

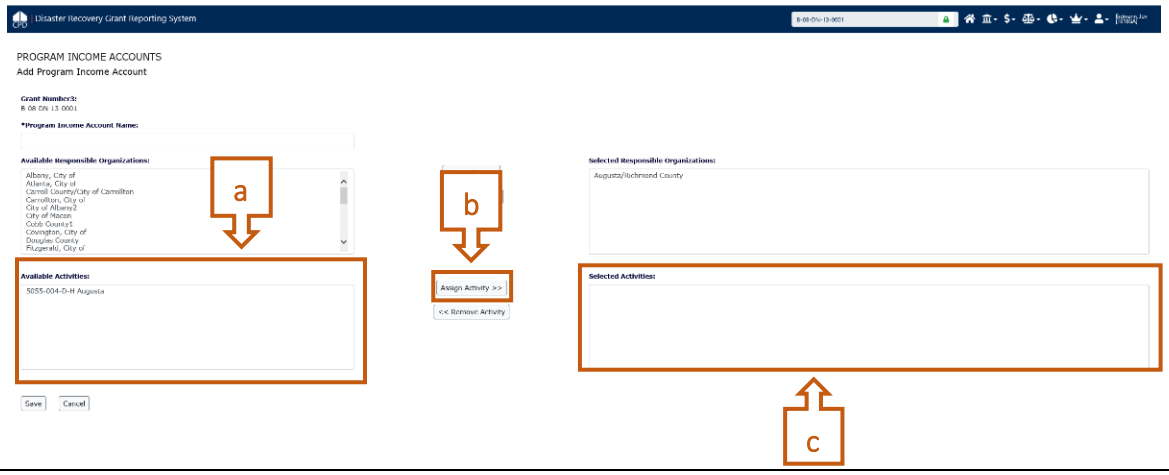


User Role: Draw Requestor and Draw Approver	**Menu Option:** Add Program Income Account

3 Select the desired Responsible Organization from the "Available Responsible Organizations" field (see (a) below) and select **<Assign Org>** (see (b) below). The "Selected Responsible Organization" (see (c) below) and "Available Activities" fields will refresh. To remove a Responsible Organization, select **<Remove Org>**.

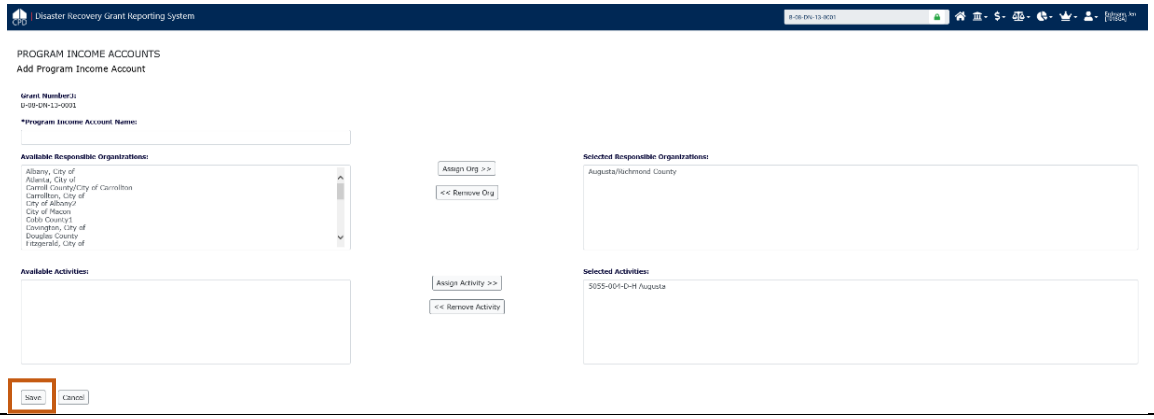


4 Select the desired activity from the "Available Activities" field (see (a) below) and select **<Assign Activity>** (see (b) below). The "Selected Activities" field will refresh.



User Role: Draw Requestor and Draw Approver	**Menu Option:** Add Program Income Account

5 Once complete, select **<Save>**. The **"Search for Program Income Accounts"** page will load and display the following message "Program Income Account Created Successfully.



D2. Grantee | Search and Edit Program Income Accounts

User Role: Draw Requestor and Draw Approver	**Menu Option:** Search/Edit PI Accounts

Purpose: Allow Grantee Drawdown Users to search and edit a Program Income Account.

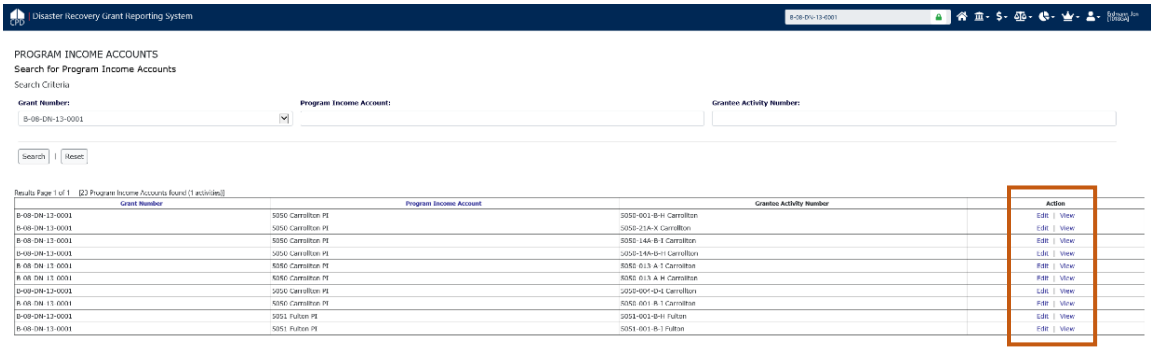
Complete the following steps to search and edit a Program Income Account:

1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Edit PI Account>**. The **"Search for Program Income Account"** page will load.

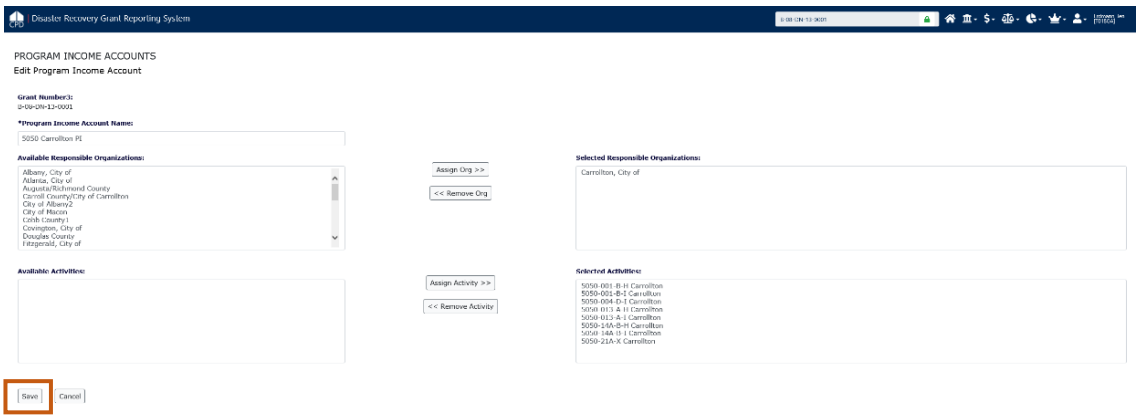
2 Once on the **"Search for Program Income Account"** page, select the desired "Grant Number" from the dropdown menu. Complete the remaining search criteria fields to narrow the search results. When complete, select the **<Search>** button.

User Role: Draw Requestor and Draw Approver	**Menu Option:** Search/Edit PI Accounts

3 Select the **<Edit>** link under the "Action" column to edit the desired Program Income Account. The **"Edit Program Income Account"** page will load.



4 Edit the desired fields, keeping in mind that an activity cannot be removed from a PI Account unless the PI receipted and drawn does not affect the DRGR Math Rules described in Section B.2. When complete, select the **<Save>** button. DRGR will return the user to the **"Search for Program Income Accounts"** page and display the following message "Program Income Account Updated Successfully."



D3. HUD | Search and View Program Income Accounts

User Role: HUD User	**Menu Option:** Search/View PI Accounts

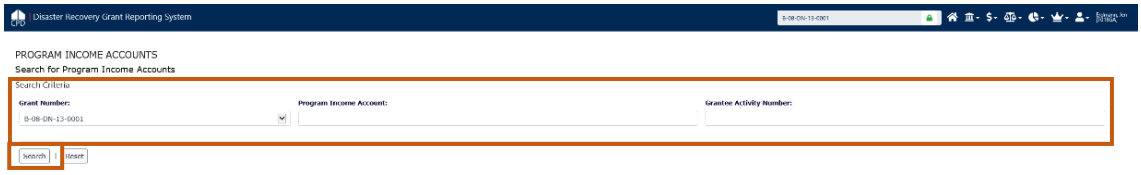
Purpose: Allow HUD Users to search and view a Program Income Accounts.

Complete the following steps to search and view a Program Income Accounts:

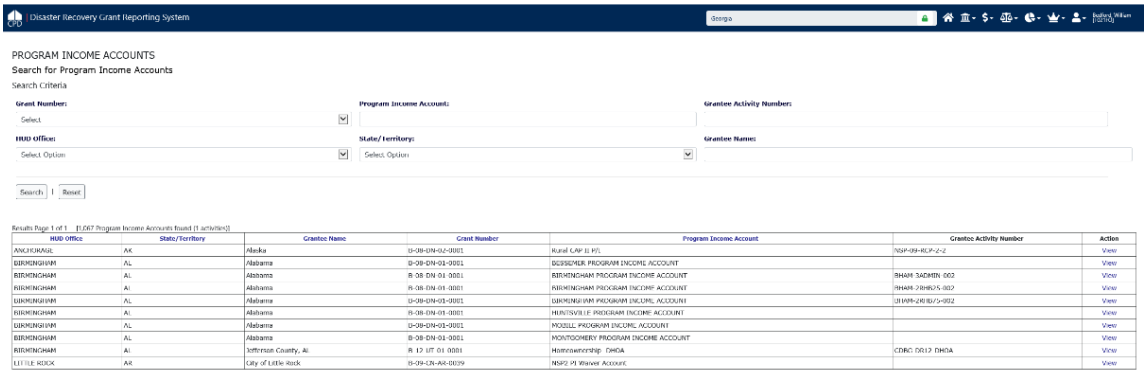
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/View PI Account>**. The **"Search for Program Income Account"** page will load.

User Role: HUD User	**Menu Option:** Search/View PI Accounts

2 Once on the **"Search for Program Income Account"** page, select the desired "Grant Number" from the dropdown menu. Complete the remaining search criteria fields to narrow the search results. When complete, select the **<Search>** button.



3 Select the **<View>** link under the "Action" column to view the desired Program Income Account. The **"View Program Income Account"** page will load.



Chapter 26: Return Funds to Line of Credit | Financial Module

Chapter 26: Return Funds to Line of Credit 1

A. Financial Module Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Return Funds to Line of Credit (Not a DRGR Function) 2

B1. Grantee | Voucher Revision 3

B2. Grantee | Classification of Returned Funds 6

B3. HUD | Search and View Vouchers 8

Chapter 26: Return Funds to Line of Credit

This Chapter provides instruction for authorized Grantee Users to return Grant funds to the Line of Credit for the appropriate Grant contained in the **Manage my Financials** module.

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

Grantee Users

Menu Option	Subsection	Action
Search/Maintain Vouchers	B1 – B2	Search and revise existing Vouchers

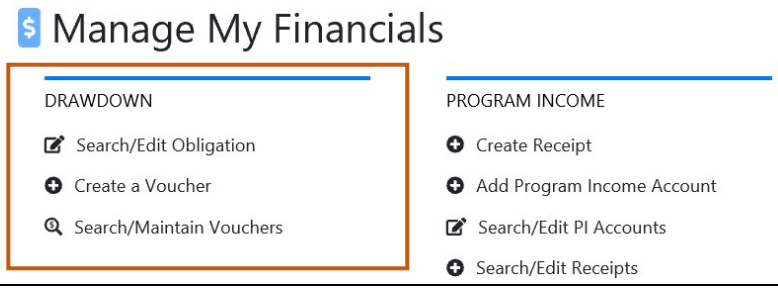
HUD Users

Menu Option	Section	Action
Search/Maintain Vouchers	B3	Search and view existing Vouchers

A. Financial Module Access

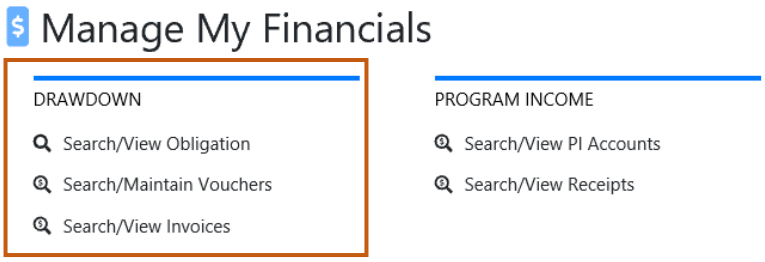
The **Manage My Financials** module contains all financial transaction-related functions.

A1. Grantee | User Access

User Role: Grantee Users	**Menu Option:** Manage My Financials Module
Purpose: Allow Grantee Users to access Collection Voucher actions.	
Complete the following steps to acess the Manage My Financials Module:	
1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation bar.	
2 This opens the dropdown menu items for the **Manage My Financials** module. The DRGR System displays the relevant menu items based on user type and user roles. 	

User Role: Grantee Users	**Menu Option:** Manage My Financials Module

A2. HUD | User Access

User Role: HUD Users	**Menu Option:** Manage My Financials Module
Purpose: Allow HUD Users to access View Voucher actions.	
Complete the following steps to acess the Manage My Financials Module:	
1 In the DRGR System, select the **Manage My Financials** Module, or icon, located in the navigation bar.	
2 This opens the dropdown menu items for the **Manage My Financials** Module. The DRGR System displays the relevant menu items based on user type and user roles. 	

B. Return Funds to Line of Credit (Not a DRGR Function)

Grantees may need to wire funds back to LOCCS if, for example, monitoring or audit events revealed an activity did not conform to the program requirements or Grant funds were drawn for an ineligible cost. Funds returned to LOCCS appear in DRGR to "refund" the drawn amount that was returned to LOCCS. Before performing tasks in DRGR, Grantees must first wire the amount of funds that need to be returned to LOCCS using non-Federal sources. The following is an example Wire Transfer Instructions:

Wire Transfer Instructions

U.S. Department of Housing and Urban Development
Abbreviated Wire-Transfer Instructions
Bank Name: Bank Address: ABA Routing Number: Account Number: Account Holder:
Memorandum or Third Party Information
Please indicate the project, grant, or loan number that the funds should be applied to including the Budget Line Item (BLI), if applicable. Also, if the funds are to be returned to the U.S. Treasury as Interest or HOPE III Resale Proceeds, please annotate as such.

The Grantee users of TA Providers are also allowed to wire funds through the https://ww.pay.gov site.

After LOCCS processes the returned funds, a "Collection Voucher" will appear in DRGR with the status 'Completed (Needs Revision)'. Follow the steps below to complete the process.

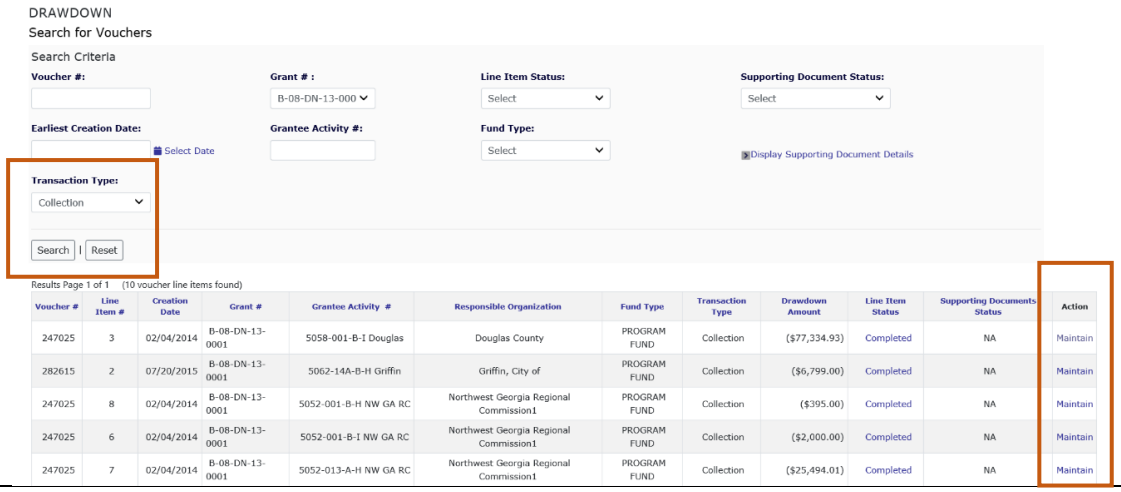
B1. Grantee | Voucher Revision

User Role: Draw Requester	**Menu Option:** Search/Maintain Vouchers
Purpose: Allow Draw Requesters to Revise Collection Vouchers.	
Complete the following steps to Revise a Collection Voucher:	
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Maintain Vouchers>**. The **"Search for Vouchers"** page will load.	

The remainder of this page intentionally left blank.

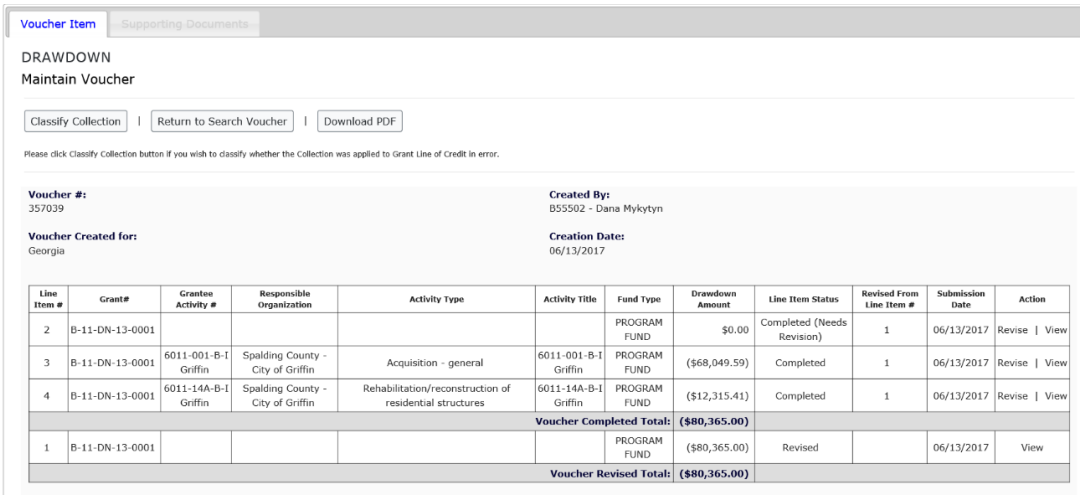
User Role: Draw Requester	**Menu Option:** Search/Maintain Vouchers

2 On the **"Search for Vouchers"** page, select **<Collection>** in the "Transaction Type" dropdown menu and select **<Search>**. Locate the desired "Collection Voucher" in the search results and select **<Maintain>** under the "Action" heading.



Voucher #	Line Item #	Creation Date	Grant #	Grantee Activity #	Responsible Organization	Fund Type	Transaction Type	Drawdown Amount	Line Item Status	Supporting Documents Status	Action
247025	3	02/04/2014	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	PROGRAM FUND	Collection	($77,334.93)	Completed	NA	Maintain
282615	2	07/20/2015	B-08-DN-13-0001	5062-14A-B-H Griffin	Griffin, City of	PROGRAM FUND	Collection	($6,799.00)	Completed	NA	Maintain
247025	8	02/04/2014	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($395.00)	Completed	NA	Maintain
247025	6	02/04/2014	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($2,000.00)	Completed	NA	Maintain
247025	7	02/04/2014	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($25,494.01)	Completed	NA	Maintain

3 **The "Maintain Voucher"** page will load. Select **<Revise>** under the "Action" heading.

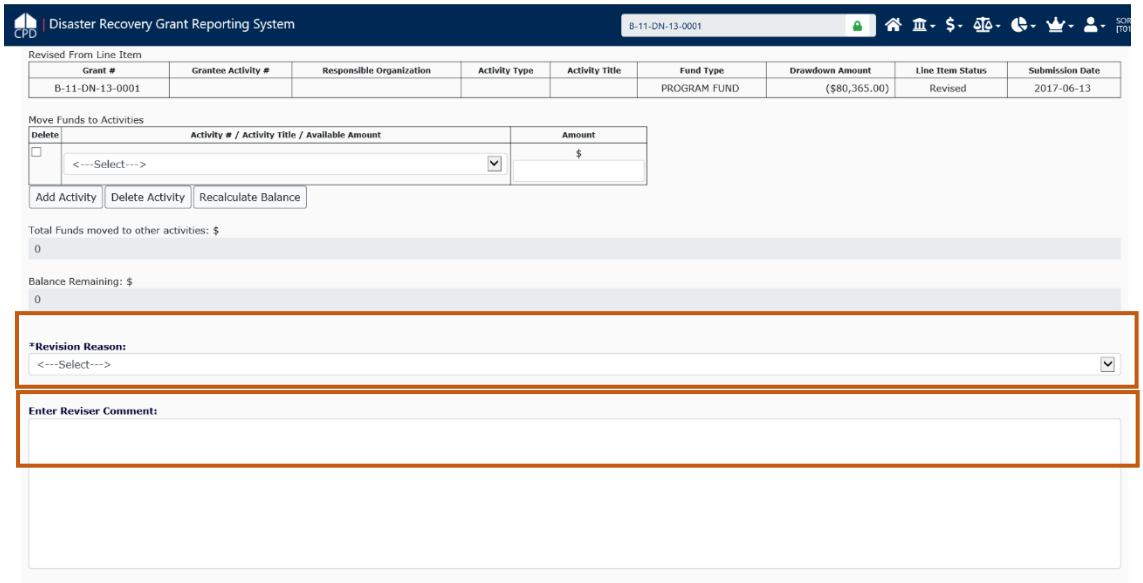


Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Revised From Line Item #	Submission Date	Action
2	B-11-DN-13-0001					PROGRAM FUND	$0.00	Completed (Needs Revision)	1	06/13/2017	Revise | View
3	B-11-DN-13-0001	6011-001-B-I Griffin	Spalding County - City of Griffin	Acquisition - general	6011-001-B-I Griffin	PROGRAM FUND	($68,049.59)	Completed	1	06/13/2017	Revise | View
4	B-11-DN-13-0001	6011-14A-B-I Griffin	Spalding County - City of Griffin	Rehabilitation/reconstruction of residential structures	6011-14A-B-I Griffin	PROGRAM FUND	($12,315.41)	Completed	1	06/13/2017	Revise | View
						Voucher Completed Total:	**($80,365.00)**				
1	B-11-DN-13-0001					PROGRAM FUND	($80,365.00)	Revised		06/13/2017	View
						Voucher Revised Total:	**($80,365.00)**				

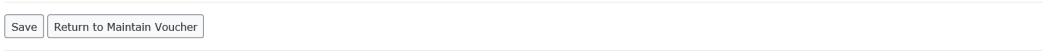
4 The **"Revise Voucher"** page will load. Notice the "Drawdown Amounts" are a negative number, meaning once revised, the revision will reduce the drawn amount for an activity as opposed to increasing the drawn amount through the regular voucher creation/approval process. Select the activity that resulted in the funds being returned to LOCCS. If the "Collection Voucher" represents returned funds from more than one activity, select multiple activities by selecting **<Add Activity>**.

User Role: Draw Requester	**Menu Option:** Search/Maintain Vouchers

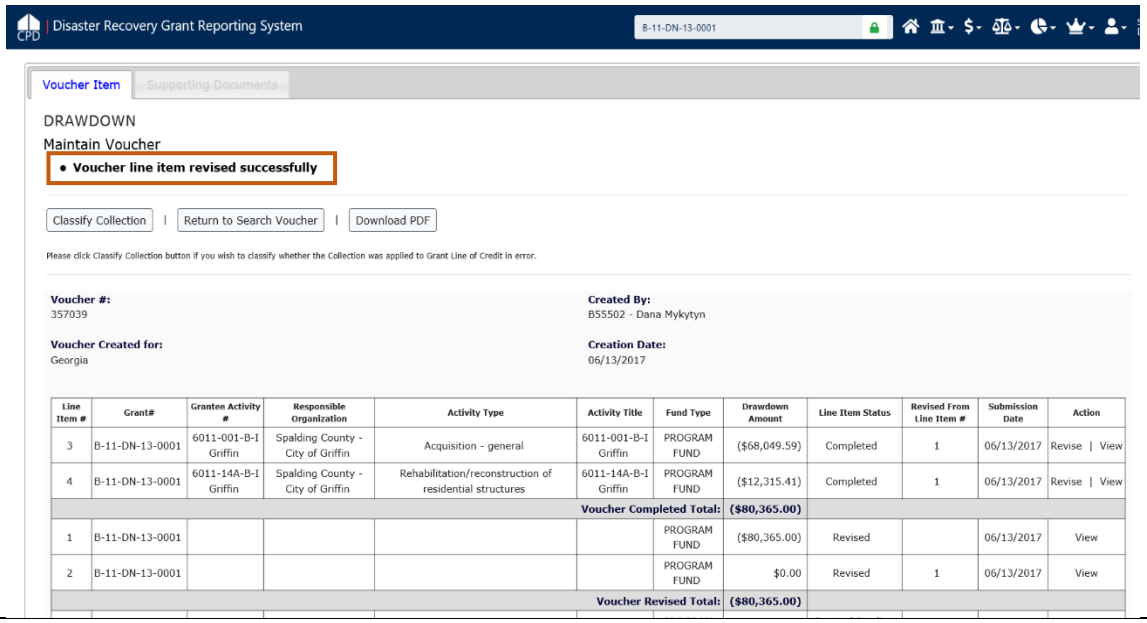
Enter the amount of funds per activity until the full amount of the "Collection Voucher" is set to be revised to one or more activities.



Select **<Save>** when all required fields are complete.



5 The **"Maintain Voucher"** page will load with a message "Voucher line item revised successfully." The drawn balance for the selected activities should now be reduced by the respective "Voucher Line Item" amounts, thereby allowing Grantees to draw those funds for the same or other activities.



B2. Grantee | Classification of Returned Funds

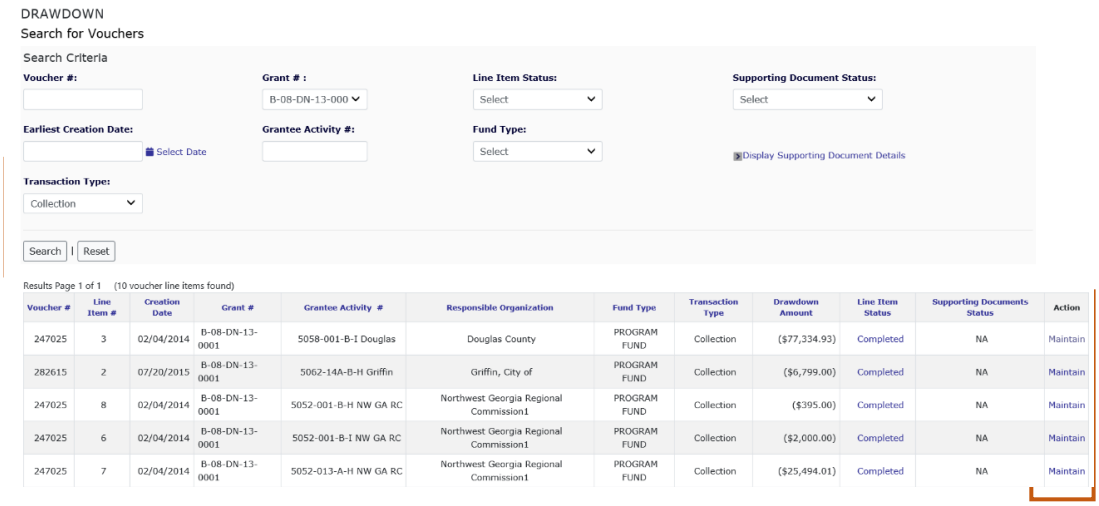
If funds were returned to LOCCS in error if, for example, the returned amount was incorrect or credited to the wrong Grant, DRGR users must "Classify the Collection Voucher in Error."

User Role: Draw Requestor	**Menu Option:** Search/Maintain Vouchers
Purpose: Allow Drawdown Users to Classify Collection Vouchers as errors.	

Complete the following steps to Classify Collection Vouchers as errors:

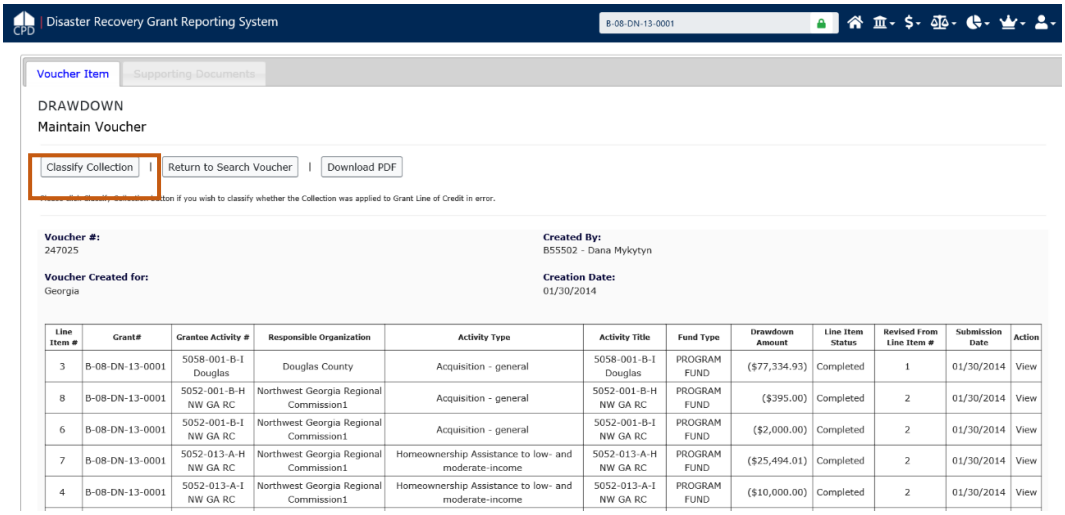
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Maintain Vouchers>**. The **"Search for Vouchers"** page will load.

2 Select **<Collection>** in the "Transaction Type" dropdown menu and select **<Search>**. Locate the desired Collection Voucher in the search results and select **<Maintain>** under the "Action" heading.



Voucher #	Line Item #	Creation Date	Grant #	Grantee Activity #	Responsible Organization	Fund Type	Transaction Type	Drawdown Amount	Line Item Status	Supporting Documents Status	Action
247025	3	02/04/2014	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	PROGRAM FUND	Collection	($77,334.93)	Completed	NA	Maintain
282615	2	07/20/2015	B-08-DN-13-0001	5062-14A-B-H Griffin	Griffin, City of	PROGRAM FUND	Collection	($6,799.00)	Completed	NA	Maintain
247025	8	02/04/2014	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($395.00)	Completed	NA	Maintain
247025	6	02/04/2014	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($2,000.00)	Completed	NA	Maintain
247025	7	02/04/2014	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($25,494.01)	Completed	NA	Maintain

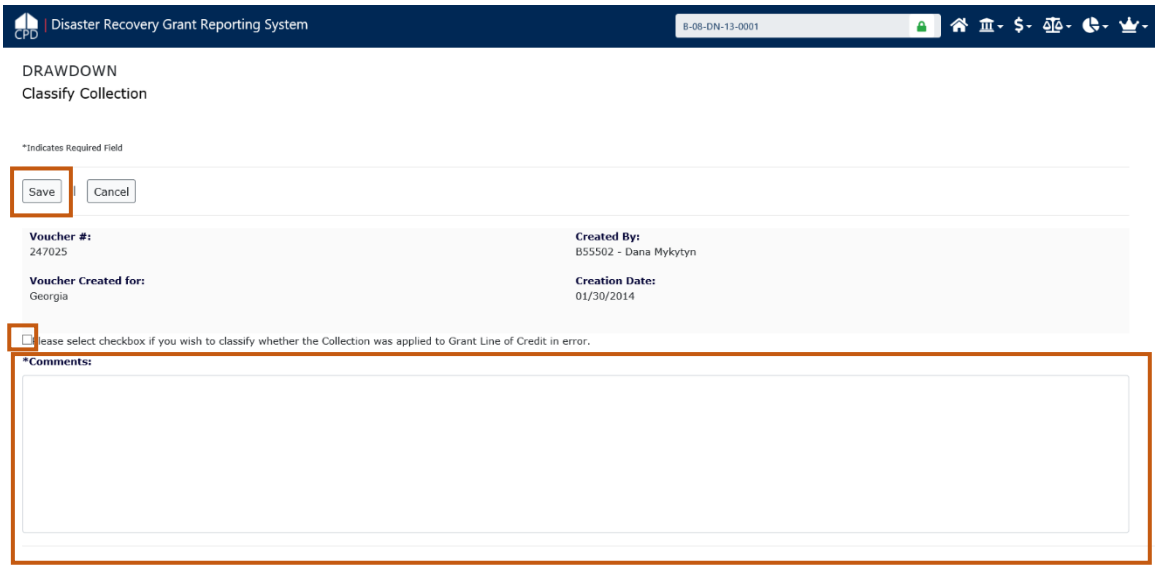
3 The **"Maintain Voucher"** page will load. Select **<Classify Collection>**.



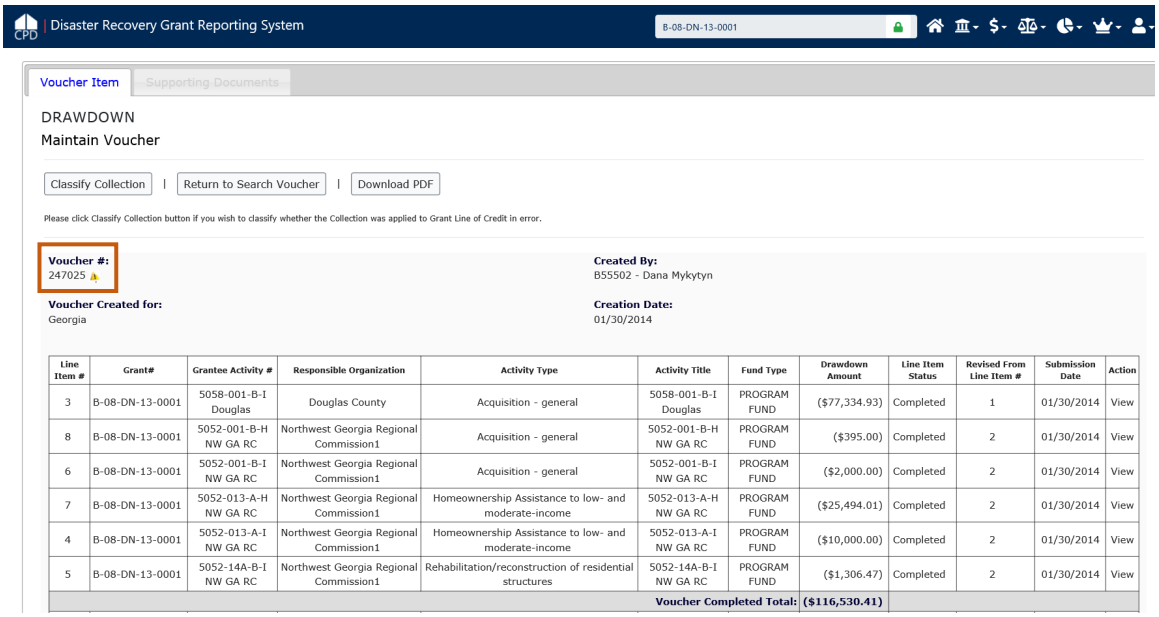
Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Revised From Line Item #	Submission Date	Action
3	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	Acquisition - general	5058-001-B-I Douglas	PROGRAM FUND	($77,334.93)	Completed	1	01/30/2014	View
8	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-H NW GA RC	PROGRAM FUND	($395.00)	Completed	2	01/30/2014	View
6	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-I NW GA RC	PROGRAM FUND	($2,000.00)	Completed	2	01/30/2014	View
7	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-H NW GA RC	PROGRAM FUND	($25,494.01)	Completed	2	01/30/2014	View
4	B-08-DN-13-0001	5052-013-A-I NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-I NW GA RC	PROGRAM FUND	($10,000.00)	Completed	2	01/30/2014	View

User Role: Draw Requestor	**Menu Option:** Search/Maintain Vouchers

4 The **"Classify Collection"** page will load. Select the checkbox to "Classify the Collection in Error," enter comments and select **<Save>**.



4 The **"Maintain Voucher"** page will load and a symbol will apear next to the "Voucher #" indicating the "Collection Voucher" was classified as an error.



Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Revised From Line Item #	Submission Date	Action
3	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	Acquisition - general	5058-001-B-I Douglas	PROGRAM FUND	($77,334.93)	Completed	1	01/30/2014	View
8	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-H NW GA RC	PROGRAM FUND	($395.00)	Completed	2	01/30/2014	View
6	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-I NW GA RC	PROGRAM FUND	($2,000.00)	Completed	2	01/30/2014	View
7	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-H NW GA RC	PROGRAM FUND	($25,494.01)	Completed	2	01/30/2014	View
4	B-08-DN-13-0001	5052-013-A-I NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-I NW GA RC	PROGRAM FUND	($10,000.00)	Completed	2	01/30/2014	View
5	B-08-DN-13-0001	5052-14A-B-I NW GA RC	Northwest Georgia Regional Commission1	Rehabilitation/reconstruction of residential structures	5052-14A-B-I NW GA RC	PROGRAM FUND	($1,306.47)	Completed	2	01/30/2014	View
						Voucher Completed Total:	**($116,530.41)**				

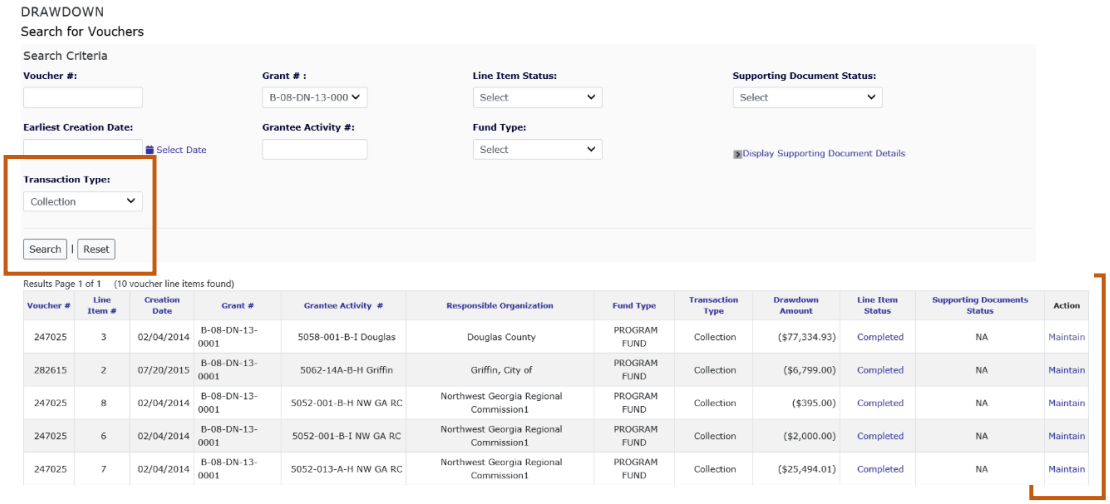
B3. HUD | Search and View Vouchers

User Role: HUD User	**Menu Option:** Search/Maintain Vouchers
Purpose: Allow HUD Users to search and view vouchers.	

Complete the following steps to Search and View Vouchers:

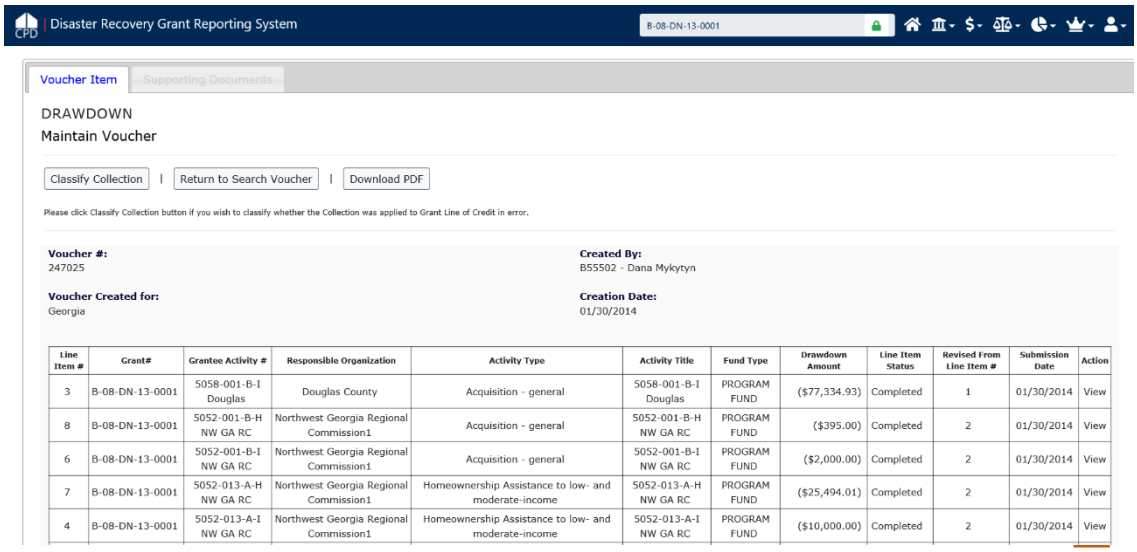
1 Navigate to the **Manage My Financials** module and locate the **Drawdown** menu. See Step A1 above. Select **<Search/Maintain Vouchers>**. The **"Search for Vouchers"** page will load.

1 Select **<Collection>** in the "Transaction Type" dropdown menu and select **<Search>**. Locate the desired Collection Voucher in the search results and select **<Maintain>** under the "Action" heading.



Voucher #	Line Item #	Creation Date	Grant #	Grantee Activity #	Responsible Organization	Fund Type	Transaction Type	Drawdown Amount	Line Item Status	Supporting Documents Status	Action
247025	3	02/04/2014	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	PROGRAM FUND	Collection	($77,334.93)	Completed	NA	Maintain
282615	2	07/20/2015	B-08-DN-13-0001	5062-14A-B-H Griffin	Griffin, City of	PROGRAM FUND	Collection	($6,799.00)	Completed	NA	Maintain
247025	8	02/04/2014	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($395.00)	Completed	NA	Maintain
247025	6	02/04/2014	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($2,000.00)	Completed	NA	Maintain
247025	7	02/04/2014	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	PROGRAM FUND	Collection	($25,494.01)	Completed	NA	Maintain

2 The **"Maintain Voucher"** page will load. Select **<View>** under the "Action" heading.



Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Revised From Line Item #	Submission Date	Action
3	B-08-DN-13-0001	5058-001-B-I Douglas	Douglas County	Acquisition - general	5058-001-B-I Douglas	PROGRAM FUND	($77,334.93)	Completed	1	01/30/2014	View
8	B-08-DN-13-0001	5052-001-B-H NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-H NW GA RC	PROGRAM FUND	($395.00)	Completed	2	01/30/2014	View
6	B-08-DN-13-0001	5052-001-B-I NW GA RC	Northwest Georgia Regional Commission1	Acquisition - general	5052-001-B-I NW GA RC	PROGRAM FUND	($2,000.00)	Completed	2	01/30/2014	View
7	B-08-DN-13-0001	5052-013-A-H NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-H NW GA RC	PROGRAM FUND	($25,494.01)	Completed	2	01/30/2014	View
4	B-08-DN-13-0001	5052-013-A-I NW GA RC	Northwest Georgia Regional Commission1	Homeownership Assistance to low- and moderate-income	5052-013-A-I NW GA RC	PROGRAM FUND	($10,000.00)	Completed	2	01/30/2014	View

Chapter 27: RESERVED

This Chapter is reserved for a future release.

Chapter 28: Financial - HUD Voucher Approval | Manage My Financials Module

Chapter 28: Financial - HUD Voucher Approval | Manage My Financials Module i

Chapter 28: Financial - HUD Voucher Approval 1

A. Manage My Financials Module Access 1

A1. HUD | User Access 1

B. HUD Voucher Review 2

B1. HUD | Search for a Voucher 2

B2. HUD | Approve/Reject or Revoke a Voucher Line Item 5

Appendix 1: View Voucher Line Item – Description of Information 10

Chapter 28: Financial - HUD Voucher Approval

This Chapter provides guidance for HUD Users on the voucher functions in the **Manage My Financials** module.

HUD Users

Location	Subsection	Action
Search/Maintain Vouchers	B1	Search for a Voucher Line Item
Search/Maintain Vouchers	B2	Approve/Reject a Voucher Line Item

A. Manage My Financials Module Access

The **Manage My Financials** module contains the main functions to search for and take actions on vouchers.

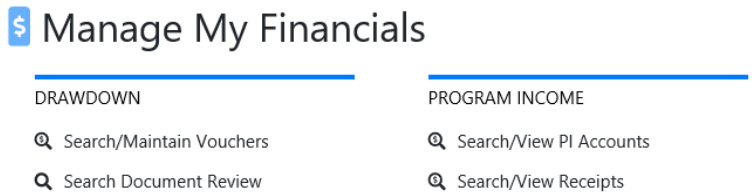
A1. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Financials
Purpose: Allow HUD Users to access the **Manage My Financials** module.	

Complete the following steps to access the Manage My Financials module:

1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation menu.

2 This opens the menu items for the **Manage My Financials** module. The System displays the menu items based on the user's type and roles. Below is the **Manage My Financials** menu for a HUD User.



B. HUD Voucher Review

B1. HUD | Search for a Voucher

User Role: HUD User	Menu Item: Search/Maintain Vouchers
Purpose: Allow HUD users to search for a voucher line item and the associated voucher	

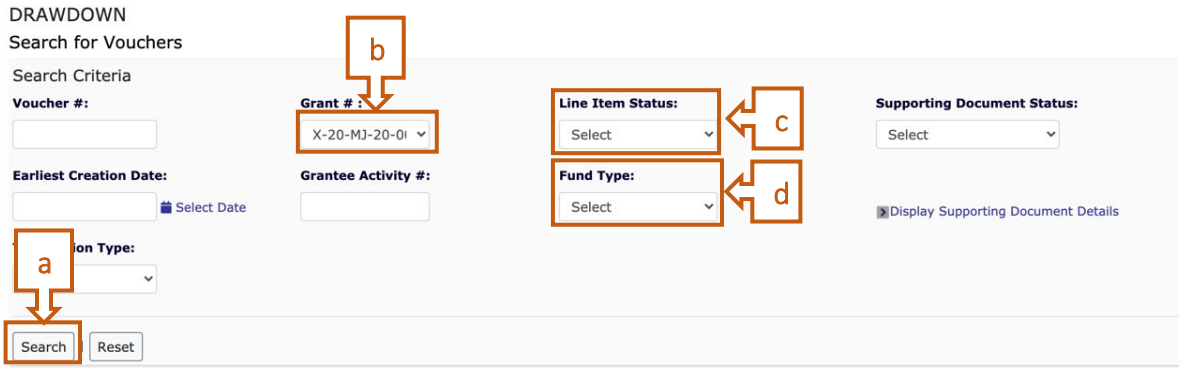
Complete the following steps to search for a voucher line item

1 Navigate to the **Manage My Financials** module. See Sections A1 above. Locate the **Drawdown** menu and select the **<Search/Maintain Vouchers>** link. The **"Drawdown – Search for Voucher"** page will load.

2 On the **"Drawdown - Search for Vouchers"** page, Grantee and HUD users can search for voucher line items. Note, each result is an individual voucher line item associated with a specific activity and fund type. Most vouchers contain more than one-line item, so the voucher numbers in the results may repeat as different voucher line items from the same voucher are displayed.

> TIP! This search is NOT locked by the Grant selected in the top navigation bar. Be sure to search in the correct Grant. (See (b) below.)

Users may enter search criteria to refine a search or perform a blank search by entering no criteria and selecting **<Search>**. (See (a) below.)

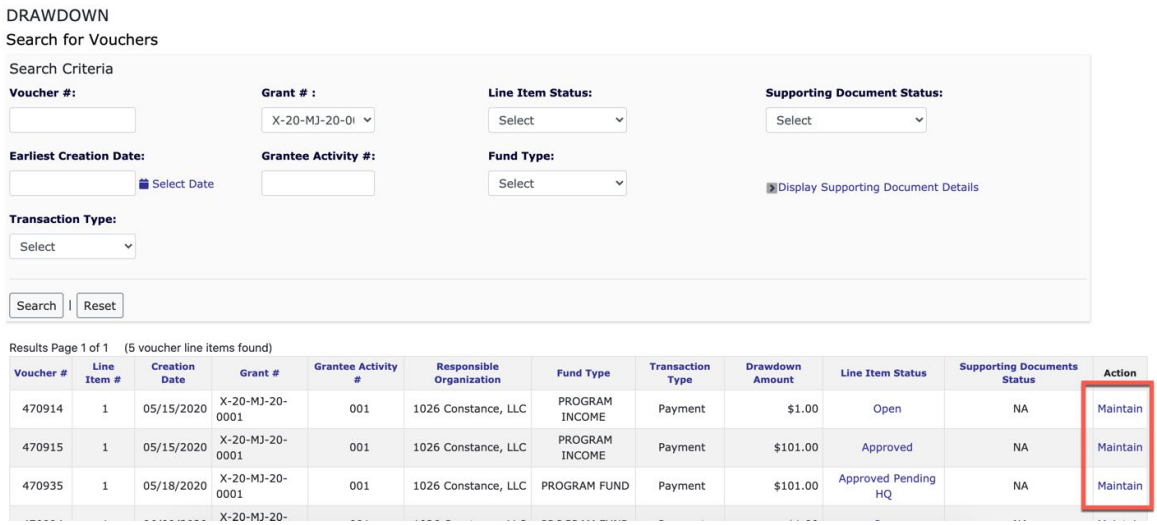


On the "**Drawdown-Search for Vouchers**" page, a particularly useful search constraint is to search by "Line Item Status" (See (c) above.) One easy way to find vouchers ready for HUD approval is to search vouchers with an 'Approved Pending HQ' Line Item Status.

> TIP! For better search results use the <Reset> link between searches.

Another common constraint is the "Fund Type" (PF/PI) (See (d) below.)

To maintain or view an individual voucher, select **<Maintain>** on the right-hand side. The "**Maintain Voucher**" page will load.



3 On the **"Maintain Voucher"** page, the entire voucher is displayed, not just the chosen voucher line item.

From this page the user can select a number of actions, designated by active links in the "Action" column. These links are dependent upon the status of the Voucher Line Item, and the user's drawdown rights. HUD users can:

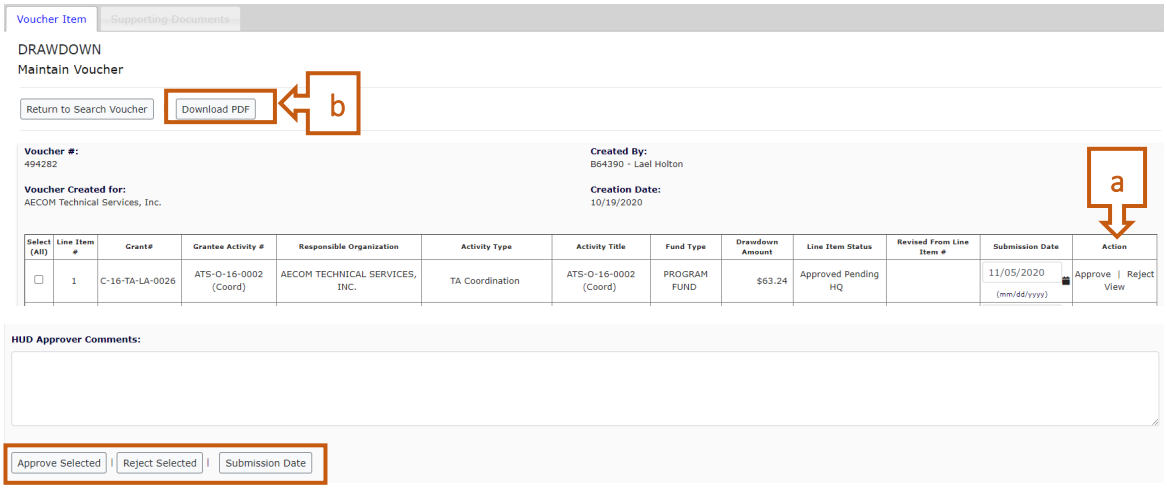
(a) **approve**, **reject** and **view** *individual* voucher line items;

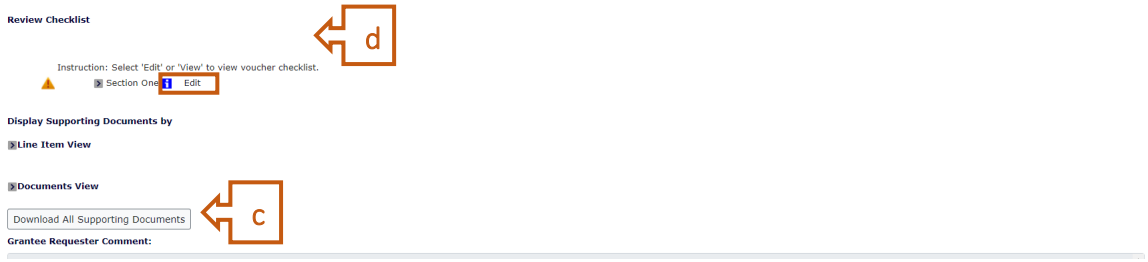
(b) **download** vouchers;

(c) **download** supporting documents; and

(d) **edit** a review checklist, for certain Grants.

HUD Users can also **approve/reject** and **revoke** one or more selected vouchers in certain situations (covered in this Chapter). Further, HUD Users can also select the **<Return to Search Voucher>** link to go back to the search they just ran.





This <**View>** link opens the "**View Voucher Line Item**" page. This page displays detailed information about the selected voucher line item, including the status of the batch in which the line item was packaged and sent to LOCCS. Additional information regarding the **"View Voucher Line Item"** page is provided in Appendix 1.

B2. HUD | Approve/Reject or Revoke a Voucher Line Item

User Role: HUD Draw Approver	**Menu Item:** Search/Maintain Vouchers

Purpose: Allow HUD Drawdown Approver User to approve/reject a voucher line items as appropriate. Voucher line item revocations will also be covered.

Complete the following steps to approve/reject a voucher line item

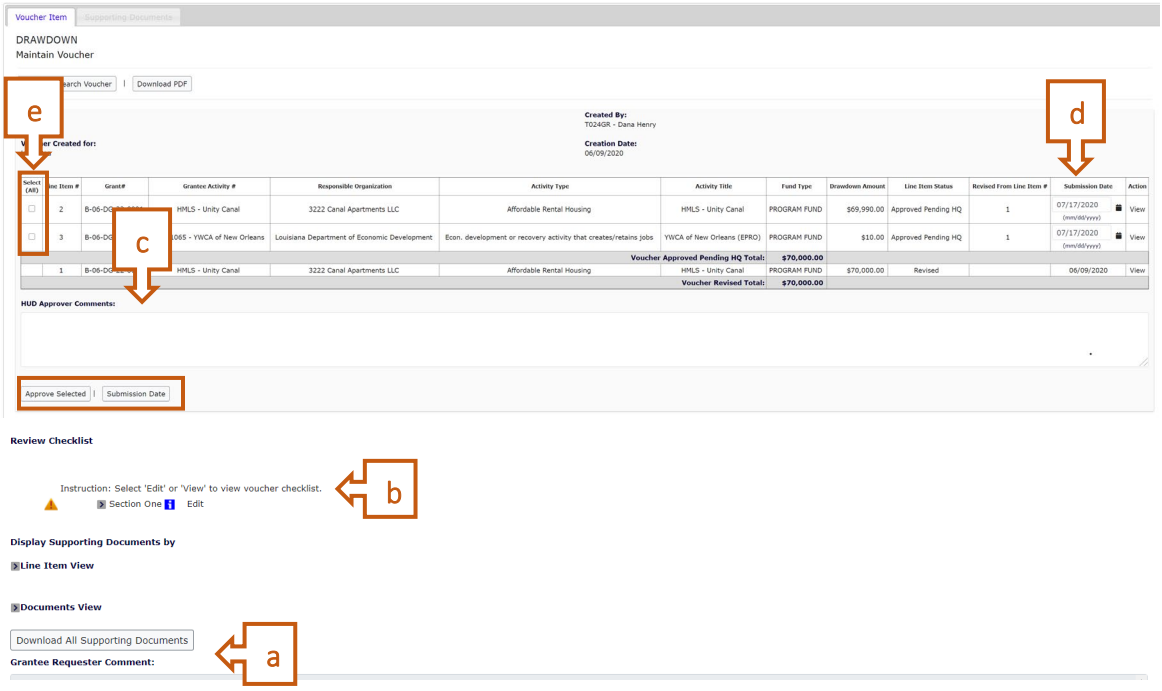
1 Navigate to the **Manage My Financials** module. See Sections A1 above. Locate the **Drawdown** menu and select the **<Search/Maintain Vouchers>** link. The **"Drawdown – Search for Voucher"** page will load. Search for the voucher that needs to be approved as described in Section B1 above. Select **<Maintain>.**

2 The "**Maintain Voucher"** page will load. The entire voucher is displayed on this page, not just the chosen voucher line item. HUD Users take the following steps to approve or reject a Grantee voucher.

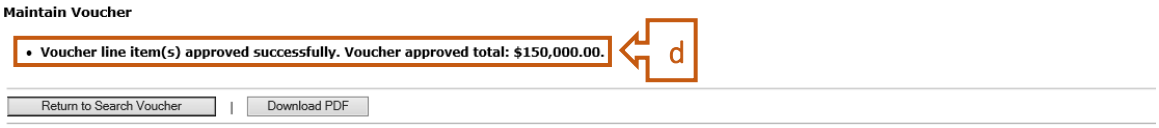
> TIP! HUD Users approving TA Provider vouchers are able to link to the activity/work plan details.

a) Download and review the supporting documents attached to the voucher and review the comments from the Grantee Draw Approver.
b) If available, select and complete the Review Checklist, using the <**Edit**> link. This opens a separate window. After **<Save>** button is selected on checklist, users should wait until the DRGR System confirms that the data saved successfully before closing the checklist window to return to **"Maintain Voucher"** page.
c) Enter a comment in the "HUD Approver Comments" field.
d) Change the submission date for the voucher line item, if necessary. The submission date specifies when the voucher will be submitted to LOCCS. The date can be entered manually in a MM/DD/YYYY format or selected using the pop-up calendar. The date cannot be after the activity block drawdown date, if applicable, see Chapter 14 regarding activity blocks.
e) Select the checkbox next to the line item(s) to be approved or rejected and select **<Approve Selected>** or the **<Reject Selected>** button.

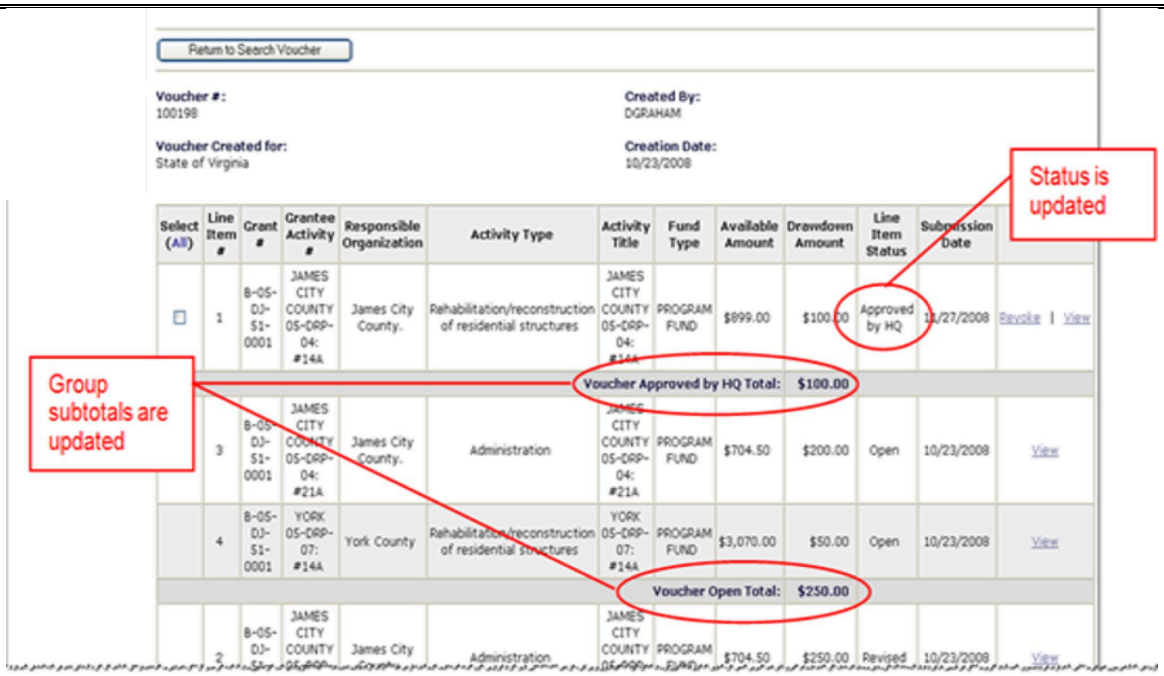
Note that from this page, the HUD User can request supporting documents using the Supporting Documents tab at the top of the page. See Chapter 29 – Voucher Supporting Documents for more information. HUD Users can also access the Review Checklist from this page.



This action refreshes the "**Maintain Voucher**" page with a message confirming the approval or rejection appears at the top of the page (see (d) below).



The status of the line items is updated as appropriate. The line items appear in the group of line items with the same status. The submission date and any comments are now read-only.



3 From the "**Maintain Voucher"** page HUD Drawdown Approvers can also revoke approvals on voucher line items. If a voucher line item was approved in error, the HUD Draw Approver can revoke the approval if the line item has not yet been submitted to LOCCS. Only line items with a line item status of 'Approved by HQ' can have their approval revoked. After approval is revoked, the line item returns to a status of Approved Pending HQ. After approval is revoked, the line item returns to the previous status of Open.

Only the HUD Draw Approver who originally approved a voucher can revoke its approval. The links shown in the "Action" column will only display the **<Revoke>** link if the user has Draw Approver rights and approved the line item.

Select the **<Revoke>** link in the "Action" column next to the line item for which you want to revoke approval.

Drawdown

Maintain Voucher

Return to Search Voucher

Voucher #:
100198

Created By:
DGRAHAM

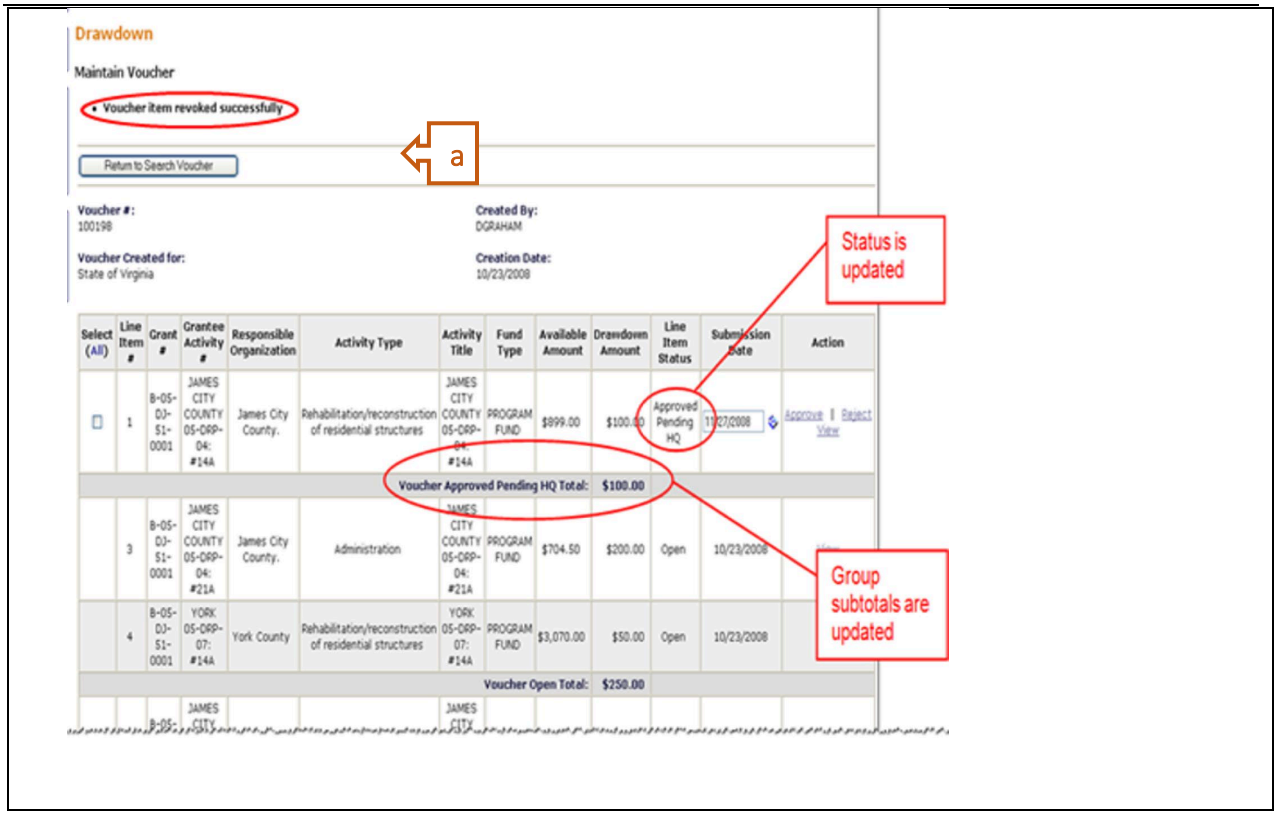
Voucher Created for:
State of Virginia

Creation Date:
10/23/2008

Select (All)	Line Item #	Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Available Amount	Drawdown Amount	Line Item Status	Submission Date	Action
☐	1	B-05-DJ-51-0001	JAMES CITY COUNTY 05-DRP-04: #14A	James City County.	Rehabilitation/reconstruction of residential structures	JAMES CITY COUNTY 05-DRP-04: #14A	PROGRAM FUND	$899.00	$100.00	Approved by HQ	11/27/2008	Revoke | View
									Voucher Approved by HQ Total:	**$100.00**		
	3	B-05-DJ-51-0001	JAMES CITY COUNTY 05-DRP-04: #21A	James City County.	Administration	JAMES CITY COUNTY 05-DRP-04: #21A	PROGRAM FUND	$704.50	$200.00	Open	10/23/2008	View
	4	B-05-DJ-51-0001	YORK 05-DRP-07: #14A	York County	Rehabilitation/reconstruction of residential structures	YORK 05-DRP-07: #14A	PROGRAM FUND	$3,070.00	$50.00	Open	10/23/2008	View
									Voucher Open Total:	**$250.00**		
		B-05-	JAMES CITY			JAMES CITY						

This action refreshes the **"Maintain Voucher"** page, with a message confirming the revocation at the top of the page (see (a) below). The status of the line item has been updated to 'Open' and the line item appears in the group of line items with the 'Open' status. The submission date and comments are now editable.

The remainder of this page is intentionally left blank.



The remainder of this page intentionally left blank.

Appendix 1: View Voucher Line Item – Description of Information

An example of a **"View Voucher Line Item"** page and a table with descriptions of the "**View Voucher Line Item**" page fields is included in this Appendix.

Screenshot: "View Voucher Line Item" page

DRAWDOWN
View Voucher Line Item

Return to Search Voucher | Return to Maintain Voucher

Voucher Created For: Louisiana
Voucher # / Line Item #: 470914 /1
Grant # : X-20-MJ-20-0001
Transaction Type: Payment
Created By: T024GR - Dana Henry
Creation Date: 05/15/2020

Grantee Requester Comments:

Voucher Level Supporting Documents
None

LOCCS Confirmation

DRGR Status: Open
Batch #:
Batch Date:
LOCCS Control #:
LOCCS Status: Blank
LOCCS Pay Code Description:
Batch Updated By: T024GR
Date Updated: 2020-05-15 11:00:15.0
Special Remarks:
Confirm Batch #:
Confirm Batch Date:
Confirmation Code:
Pay Method:
Payment Date:
Schedule #:
Reschedule:
Effective Date:

Line Item

Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Submission Date
X-20-MJ-20-0001	001	1026 Constance, LLC	Acquisition - general	Act 001	PROGRAM INCOME	$1.00	Open	2020-05-15

Supporting Documents

File Name
user reset query.txt

Revision Reason History:

Revision Comment History:

Grantee Approver Comments:
(None)

HQ Approver Comments:
(None)

Supporting Documentation History

Date:	Modification Type:	Modification:	Modified By:
05/15/2020	Document Added	user reset query.txt	T024GR Henry Dana

Return to Search Voucher | Return to Maintain Voucher

Field Descriptions for "View Voucher Line Item" Page

Area	Field	Description	
DRGR Information	DRGR Status	The status of this voucher item:	
		Open	Initial status
		Approved	Voucher approved
		Pending	Voucher pending receipt by LOCCS
		Canceled	The Grantee canceled an Open voucher
		Completed	Voucher paid through LOCCS
		Revoked	Grantee revoked voucher approval
		Revised	Grantee revised HUD Activity Number drawing the funds from this voucher
	Batch #	The LOCCS batch number in which this line item was processed. If this field displays all zeroes, the drawdown request has not yet been sent to LOCCS.	
	Batch Date	The date that the batch was sent to LOCCS.	
	LOCCS Control #	A LOCCS-assigned number used to identify the voucher line item after being processed by LOCCS.	
	LOCCS Status	The status of this voucher in LOCCS: Voucher line item confirmation file currently processing (Open) Voucher line item pending confirmation by LOCCS Voucher line item approved by LOCCS Voucher line item rejected by LOCCS Voucher line item rejected by Treasury On hold Cancelled by LOCCS Voucher line item rescheduled by LOCCS	
LOCCS Update	Batch Updated By	Identifies LOCCS as the batch processor.	
	Date Updated	The date that the batch processing results were received from LOCCS.	
	Special Remarks	LOCCS-generated comments about voucher line items that needed special processing.	

Area	Field	Description
LOCCS Confirmation Information	Confirm Batch #	The LOCCS batch number in which this voucher line item was processed after it was received from the DRGR batch.
	Confirm Batch Date	The LOCCS batch date in which this voucher line item was processed after it was received from the DRGR batch.
	Confirmation Code	The LOCCS confirmation code for this batch: P00 Processed R01 Rejected, bad batch header R02 Rejected, batch count off R03 Rejected, batch total off R03 Rejected, RCD-BCH-NO does not equal batch R05 Rejected, out of sequence on RCD-NO R50 Rejected, invalid Grantee/Grant/program R51 Rejected, insufficient funds R52 Rejected, detail total does not equal voucher total R53 Rejected, out of sequence on voucher line number R54 Rejected, duplicate voucher number R55 Rejected, failed conversion edits R59 Rejected, other voucher lines failed edits R99 Rejected, missing required information H01 Held, missing payment information H02 Held, suspension H03 Held, funding problem
	Pay Method	Identifies method of payment (check or direct deposit).
	Payment Date	Date that the payment issued.
	Schedule #	Number used to identify payment.
	Reschedule	Identifies whether the payment was rescheduled.
	Effective Date	Identifies reschedule date.

Chapter 29: Voucher Supporting Documents| Manage My Financials Module

Chapter 29: Voucher Supporting Documents 1

A. Manage My Financials Access 1

A1. Grantee | User Access 1

A2. HUD | User Access 2

B. Grantee and HUD | Search for Vouchers with Supporting Documentation 3

B1. Grantee and HUD | Search for Vouchers with Supporting Documentation 3

C. Attach Supporting Documents 4

C1. Grantee | Attach Supporting Documents During Voucher Creation 5

D. HUD Review Events and Requests for Supporting Documentation 6

D1. HUD | Add Review Events and Requests for Supporting Documents 6

D2. HUD | Add Requests for Supporting Documents from “Maintain Voucher” Page 8

D3. HUD | Complete Supporting Document Requests 9

E. Grantee Submission of Supporting Documentation Following HUD Request 12

E1. Grantee | Submission of Documentation Following HUD Request 12

Chapter 29: Voucher Supporting Documents

This Chapter provides instruction on voucher supporting documents in the **Manage My Financials** module, including how:

- Grantees can attach supporting documentation during voucher creation;
- HUD may request that supporting documentation be submitted following its review, and
- Grantees can attach supporting documentation after receiving a request from HUD.

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

Grantee Users

Location	Subsection	Action
Search/Maintain Vouchers	B1	Search for Voucher with supporting documentation
Create a Voucher	C1	Create a Voucher with supporting documentation
Search/Maintain Vouchers	E1	Submit supporting documentation following HUD Request

HUD Users

Location	Subsection	Action
Add Document Review	D1	Add a Document Review
Search Document Review	D3	Search for Document Review
Search/Maintain Vouchers	B1/D2	Search for a Voucher Line Item and request supporting documents.

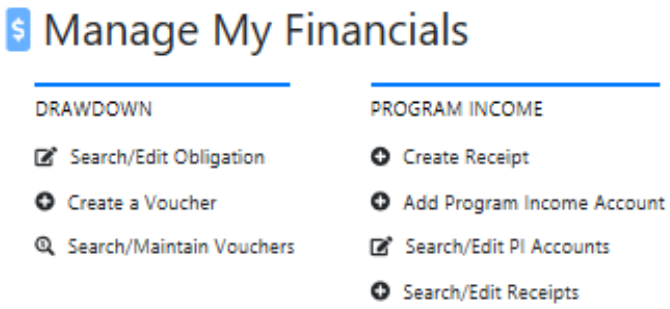
A. Manage My Financials Access

A1. Grantee | User Access

User Role: Draw Requester	**Menu Option:** $ **Manage My Financials**
Purpose: Allow Grantee Users to access the **Manage My Financials** module.	
✓ Complete the following steps to access the Manage My Grants module:	

1 In the DRGR System, select the **Manage My Financials** module, or $ icon, located in the navigation menu.

2 This opens the menu items for the **Manage My Financials** module. The System displays the menu items based on the user's type and roles. Below are the **Manage My Financials** menus for a Grantee Draw Request User.

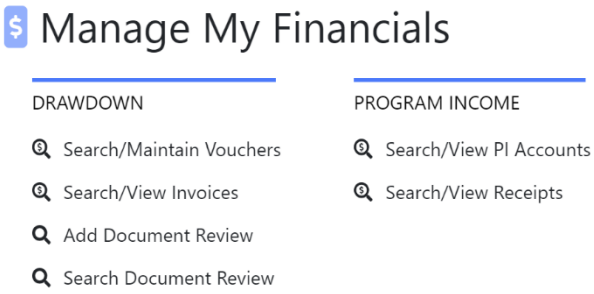


A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Financials
Purpose: Allow authorized HUD Users to access the **Manage My Financials** module.	
Complete the following steps to access the Manage My Financials module:	

1 In the DRGR System, select the **Manage My Financials** module, or icon, located in the navigation menu.

2 This opens the menu items for the **Manage My Financials** module. The System displays the relevant menu items based on user type and user roles. Below is the **Manage My Financials** menu for a HUD User with two sub-menus.



B. Grantee and HUD | Search for Vouchers with Supporting Documentation

Users can search for vouchers based on supporting documentation criteria.

B1. Grantee and HUD | Search for Vouchers with Supporting Documentation

User Role: Grantee and HUD Users	**Menu Item:** Search/Maintain Vouchers
Purpose: Allow Grantee and HUD Users to view a voucher line item supporting documentation.	

Complete the following steps to view a voucher line item

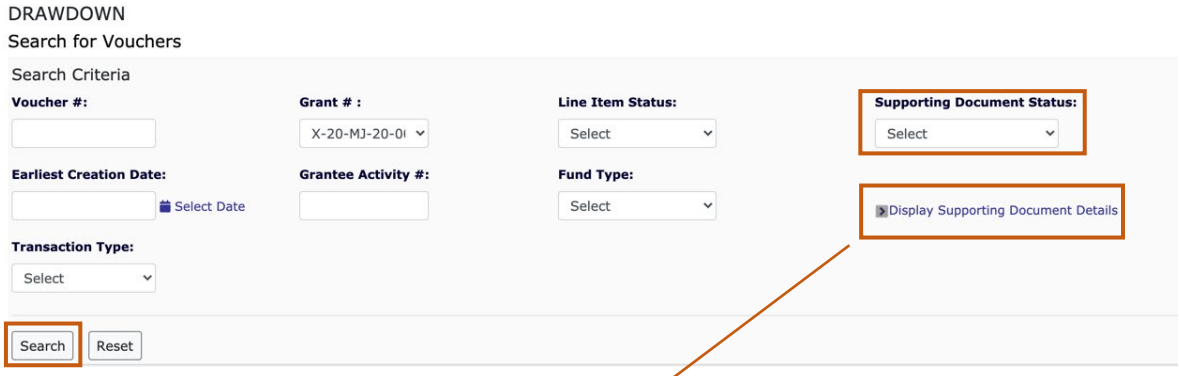
1 Navigate to the **Manage My Financials** module. See Sections A1 and A2 above. Locate the **Drawdown** menu and select the **<Search/Maintain Vouchers>** link. The **"Drawdown – Search for Voucher"** page will load.

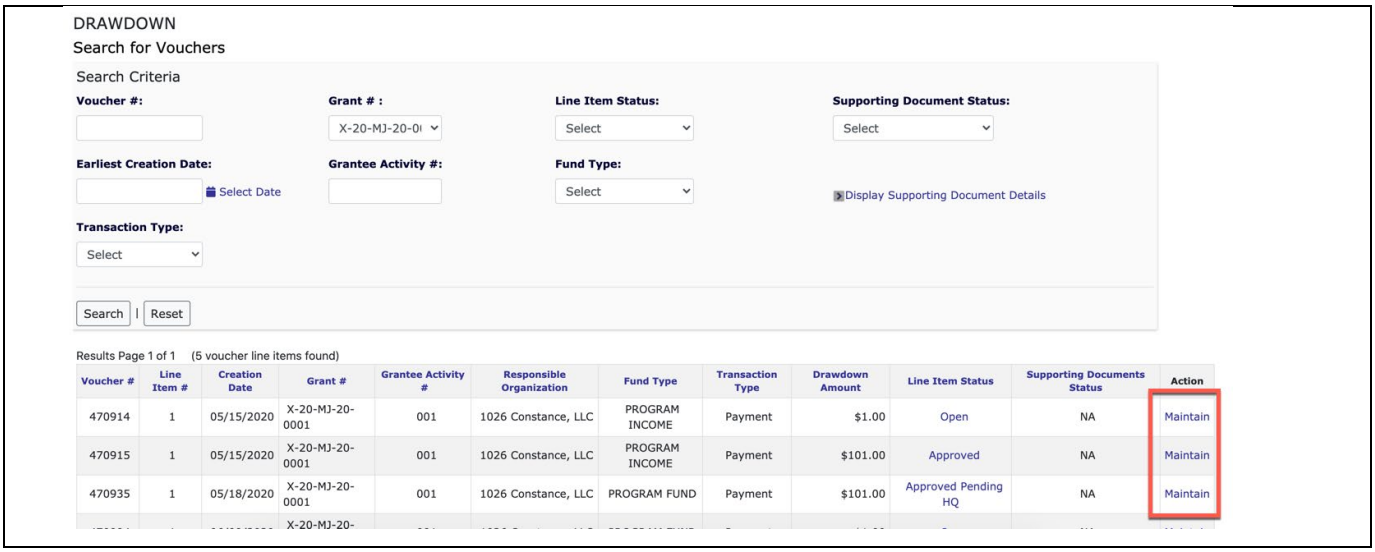
2 On the **"Drawdown - Search for Vouchers"** page, to search for vouchers with supporting documentation, select the dropdown for "Supporting Document Status" and choose from the following statuses: "Requested," "Submitted," "Complete," or "Incomplete."

Users can also select "Display Supporting Document Details" to review additional search fields related to supporting documents.

Select **<Search>**. The search results will load.

TIP! This search is NOT locked by the Grant selected in the top navigation bar. Be sure to search in the correct Grant. (See (b) below.)





C. Attach Supporting Documents

As explained in Chapter 24, Section C1, Step 6, DRGR allows Grantees to attach voucher level supporting documents during the voucher creation process. The supporting documentation is tied directly to the voucher, as applicable, according to appropriation. Some appropriations only require supporting documents on vouchers over a certain threshold amount. If the user proceeds past this step without adding the supporting documentation, then they will no longer be able to attach them without the HUD request. To review the entire voucher creation process, see Chapter 24. This section reviews the step for attaching supporting documents only.

> TIP! This step is a Grantee's ONLY chance to attach supporting documents to the voucher unless HUD requests that the documentation be attached. See Section D below for HUD requests for supporting documentation.

The remainder of this page intentionally left blank.

C1. Grantee | Attach Supporting Documents During Voucher Creation

User Role: Draw Requestor	**Menu Option:** Create a Voucher

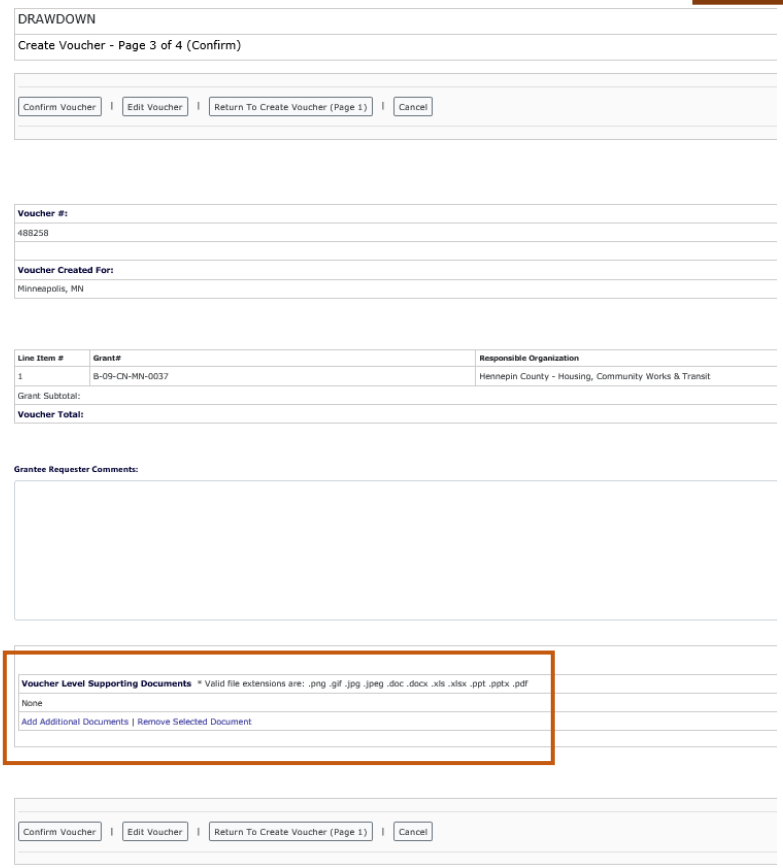
Purpose: Allow Grantee Users to attach supporting documentation during voucher creation. Users must have the "Submit Supporting Docs to HUD" User role. See Chapter 5 – User Management and Certifications for more information on roles.

Complete the following steps to attach supporting documentation to a voucher prior to HUD submission:

1 Follow Section C1 of Chapter 24 to begin the voucher creation process. On **"Create Voucher - Page 3 of 4 (Confirm)"** of the voucher creation process, users can attach supporting documentation as shown below. Multiple files may be attached by selecting **<Add Additional Documents>.** Files may be removed by selecting **<Removed Selected Documents>.**

TIPS!

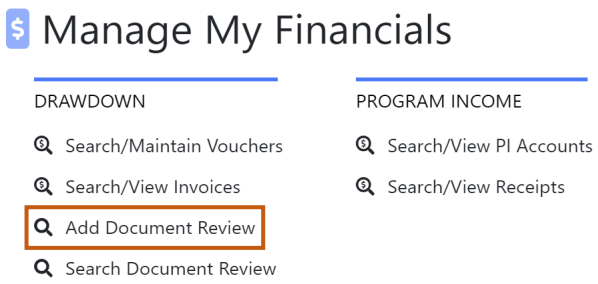
- Ensure the user has the "Submit Supporting Docs to HUD" user role.
- When attaching supporting documentation, do not use special characters in file names as the files may not attach.



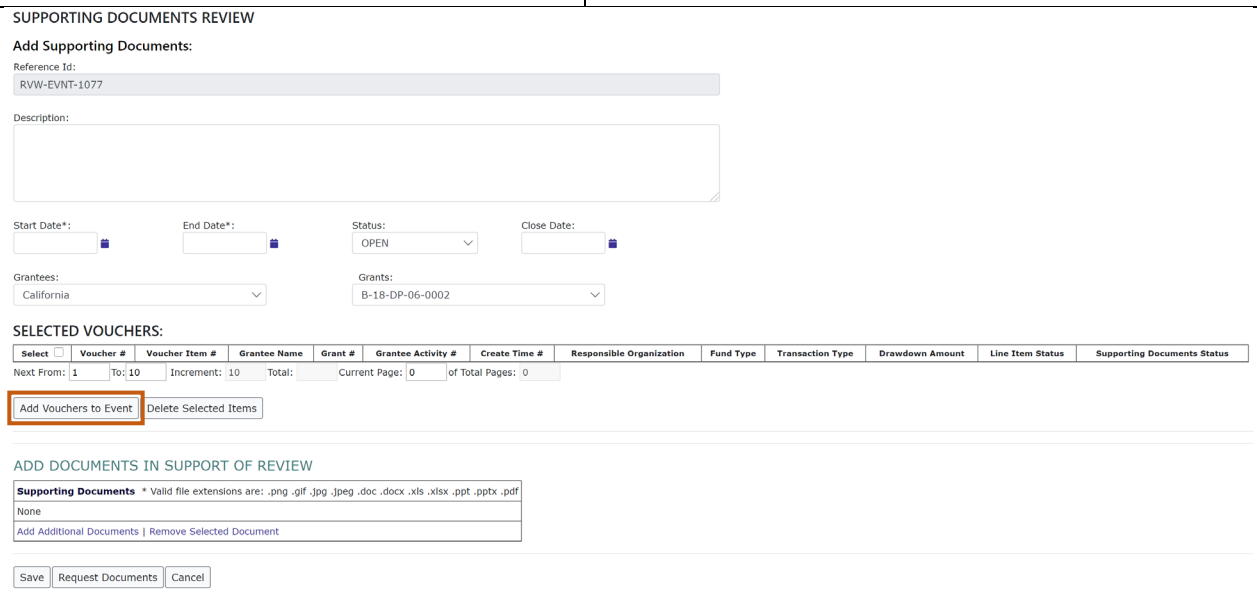
D. HUD Review Events and Requests for Supporting Documentation

D1. HUD | Add Review Events and Requests for Supporting Documents

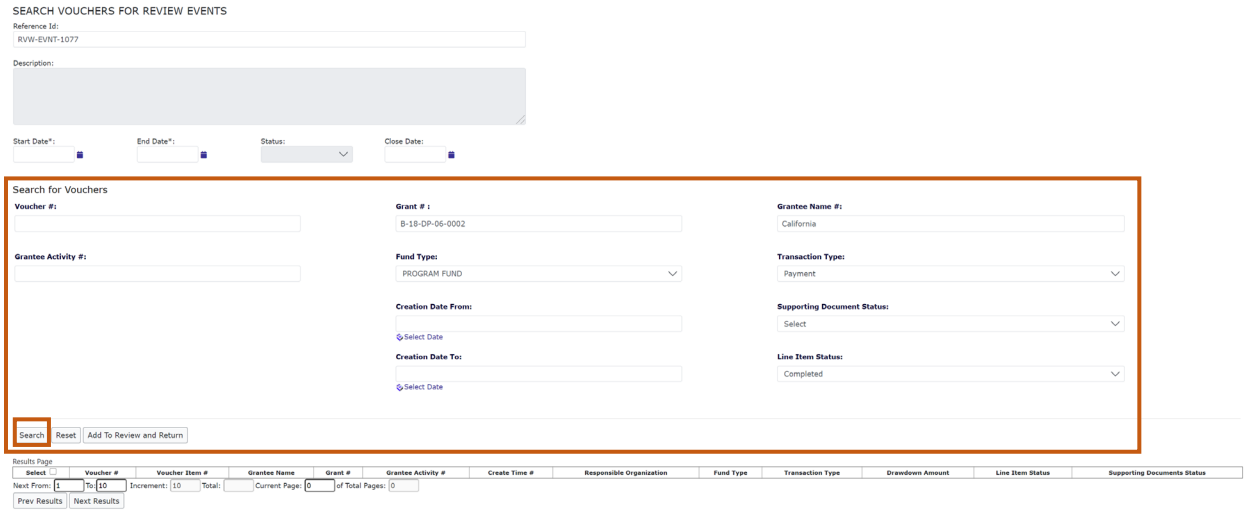
If a Grantee User has not submitted complete or accurate voucher supporting documentation when its required, the DRGR System allows HUD Users to create review events and request supporting documents from the **Manage My Financials** module. Supporting documentation can be requested through the **"Supporting Documents Review"** page (See Section D1) or from the "Supporting Documents" tab on the **"Maintain Voucher"** page.

User Role: HUD User	**Menu Option:** Add Document Review
Purpose: Allow HUD Users to add and manage a document review event and request supporting documentation.	
Complete the following steps to request supporting documents during document review:	
1 Access the **Manage My Financials** module and navigate to the Drawdown menu. See Section A2 of this Chapter. Select **<Add Document Review>**. The **"Supporting Documents Review"** page will load.  	
2 On the **"Supporting Documents Review"** page, the HUD User creates the review event by selecting a group of vouchers items to include in the review for auditing purposes. To begin: Select **<Add Vouchers to Event>**. The **"Search Vouchers for Review Event"** page will load.	

User Role: HUD User	**Menu Option:** Add Document Review

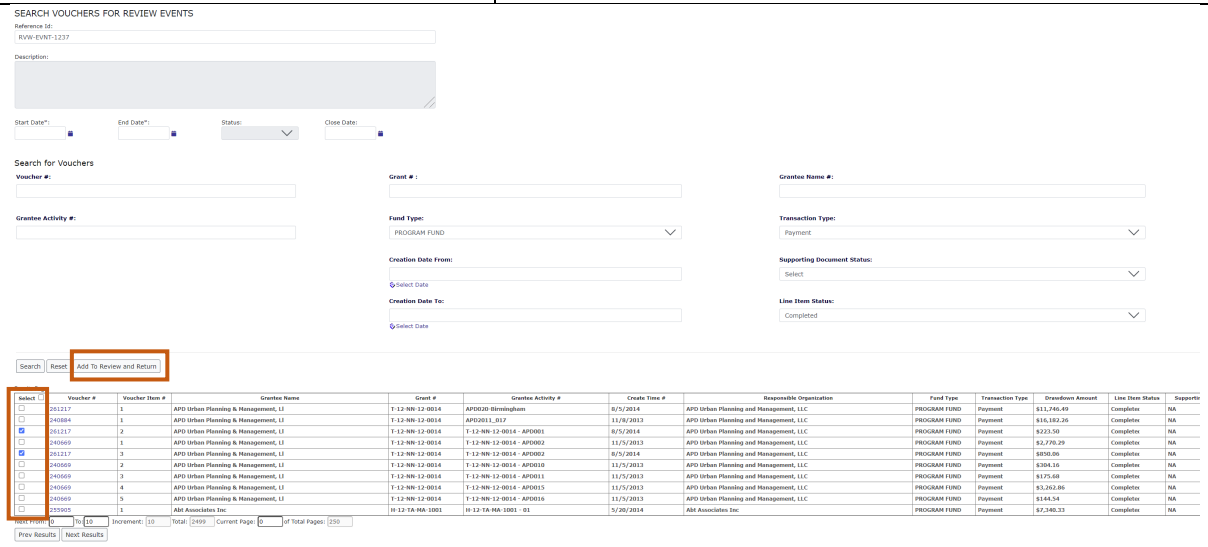


a) On the **"Search Vouchers for Review Event"** page, search for vouchers using the search criteria. Select **<Search>**.

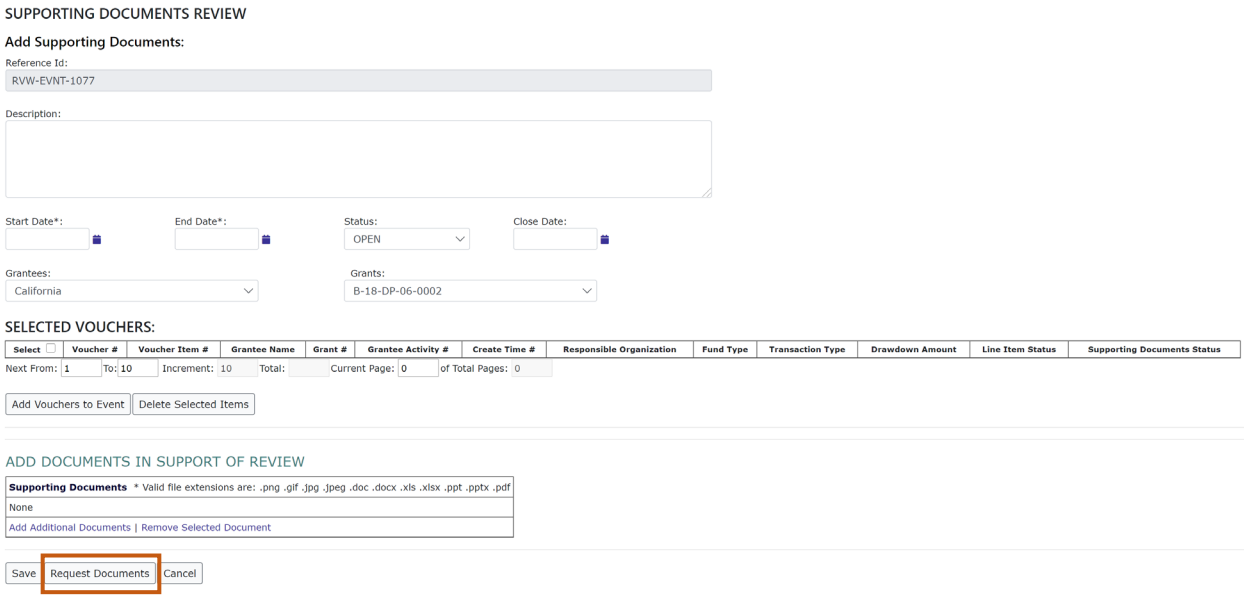


b) From the search results, select the applicable vouchers and **<Add to Review and Return>**.

User Role: HUD User	**Menu Option:** Add Document Review



3 When the vouchers are added to the review event, the HUD User can send requests for supporting documentation notifications to the review event's Grantee by selecting **<Request Documents>**. Grantee will receive an email and a "To Do" item will be displayed on the Grantee's **"Home"** page.



D2. HUD | Add Requests for Supporting Documents from "Maintain Voucher" Page

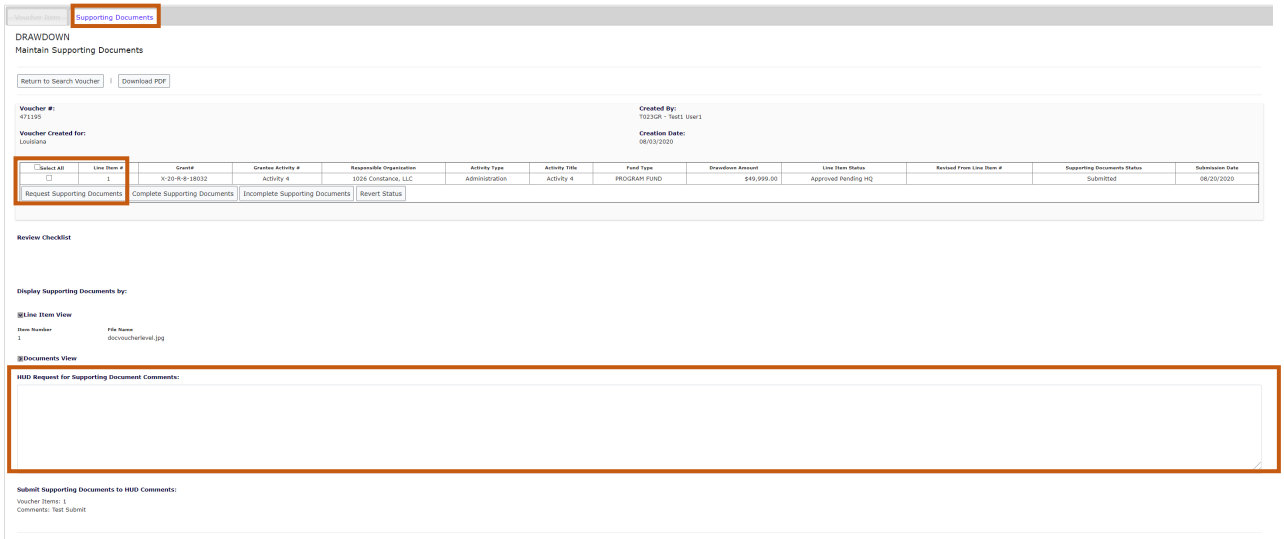
User Role: HUD User	**Menu Option:** Search/Maintain Vouchers
Purpose: Allow HUD Users to request supporting documentation from the **"Maintain Voucher"** page.	

User Role: HUD User	**Menu Option:** Search/Maintain Vouchers

Complete the following steps to request supporting documents from the "Maintain Voucher" page:

1 Search for a voucher using the steps in Section B1 above. Use search criteria to refine the search.

2 After selecting the appropriate voucher, the **"Maintain Voucher"** page will load. Select the **"Supporting Documents"** tab. The HUD User can add comments in the "HUD Request for Supporting Documents" field, select the applicable line item, and then select **<Request Supporting Documents>**. Grantee will receive an email and a "To Do" item will be displayed on the Grantee's **"Home"** page.



D3. HUD | Complete Supporting Document Requests

After the Grantee submits the requested documentation following the steps in Section E below, HUD Users can mark the supporting document request as "Approved" (Completed) or "Rejected" (Incomplete). To review the supporting documentation, users have two options described below.

User Role: HUD User	**Menu Option:** Search Document Review

Purpose: Allow HUD Users to request supporting documentation from the **"Maintain Voucher"** page.

Complete the following steps to request supporting documents from the "Maintain Voucher" page:

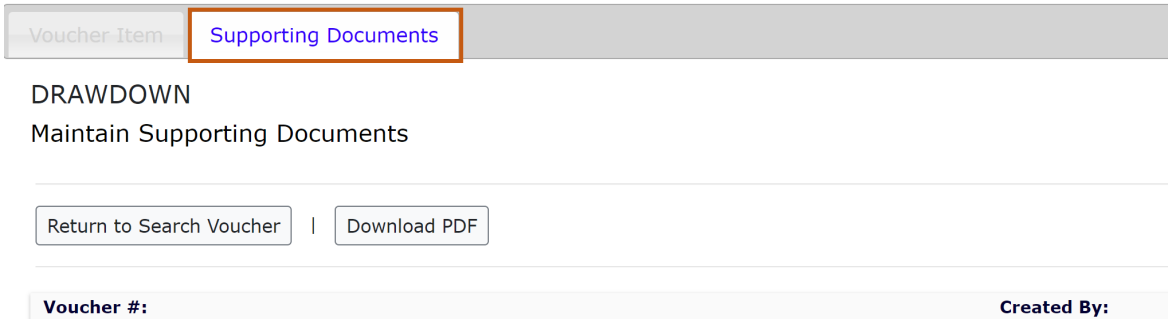
1 **Option 1** – Retrieve each individual voucher and review the voucher directly.

a) Search for vouchers using the steps in Section B1 above. On the **"Search for Vouchers"** page, search for the voucher line items with a 'Submitted' status in the Supporting Documentation Status criteria dropdown.

User Role: HUD User	**Menu Option:** Search Document Review

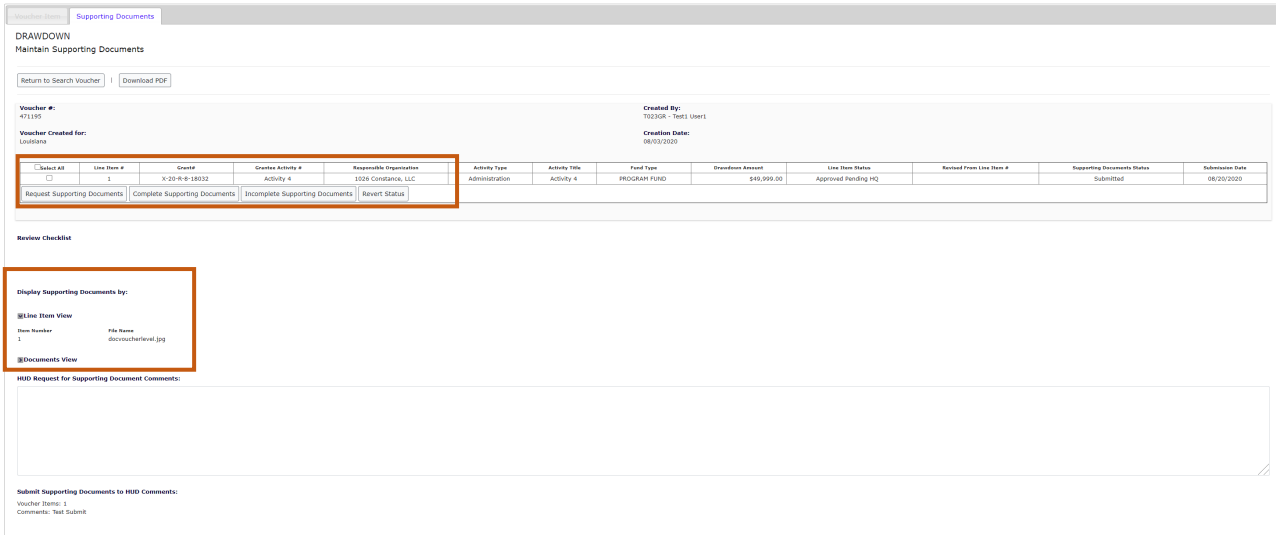
b) When the results of the selected search load, select the voucher to review using the **<Maintain>** link in the Action column.

c) On the **"Maintain Voucher"** page, select the "Supporting Documents" tab.



d) To view the supporting documentation ("voucher cover sheets") attached to the voucher line items, go to the "Supporting Documents" tab. The views display the line item number and the document file name attached to the voucher line item.

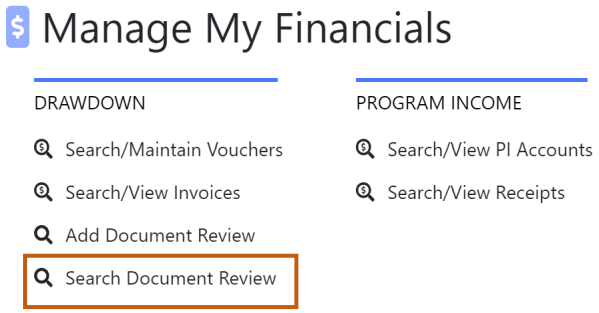
e) Select the line item to "Complete" or "Reject." Select **<Complete Supporting Document>** or **<Incomplete Supporting Documents>** as applicable.



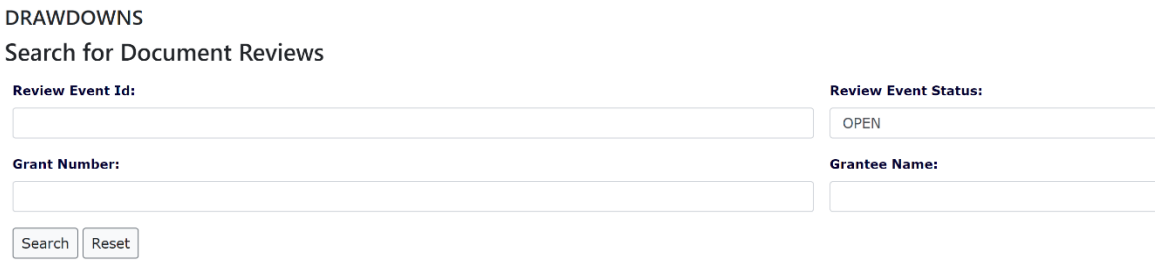
User Role: HUD User	Menu Option: Search Document Review

2 **Option 2** – Retrieve the review event and access the voucher from the voucher line items section.

a) Search for Document Reviews using the **<Search Document Review>** function in the Drawdown menu of the **Manage My Financials** module. The **"Search for Document Review"** page will load.



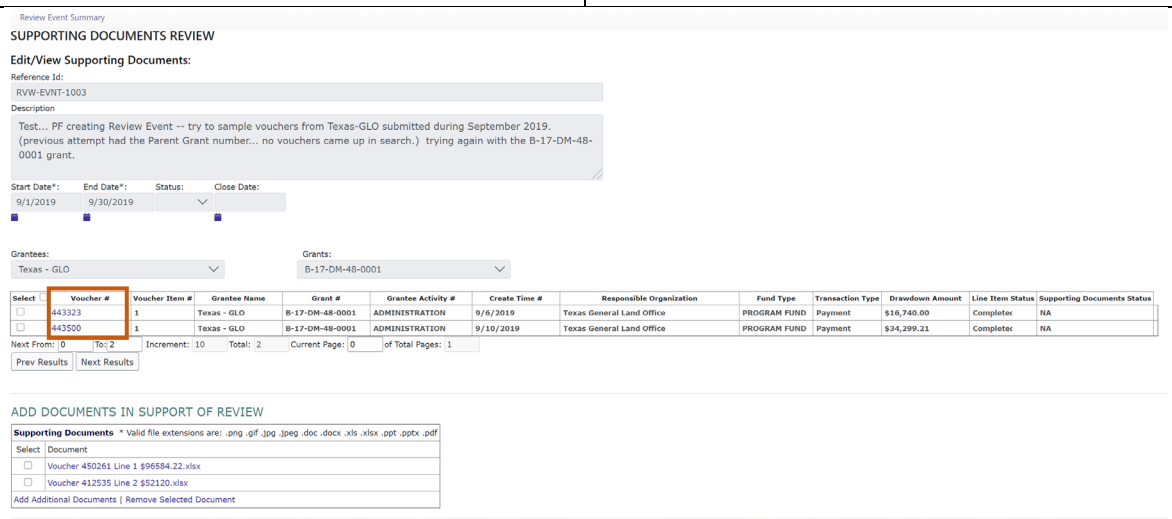
b) On the **"Search for Document Reviews"** page, enter search criteria and select **<Search>** or perform a blank search to return results for all reviews.



c) Select **<View/Edit>** in the Action column of the search results for the desired review. The **"Supporting Documents Review"** page will load.

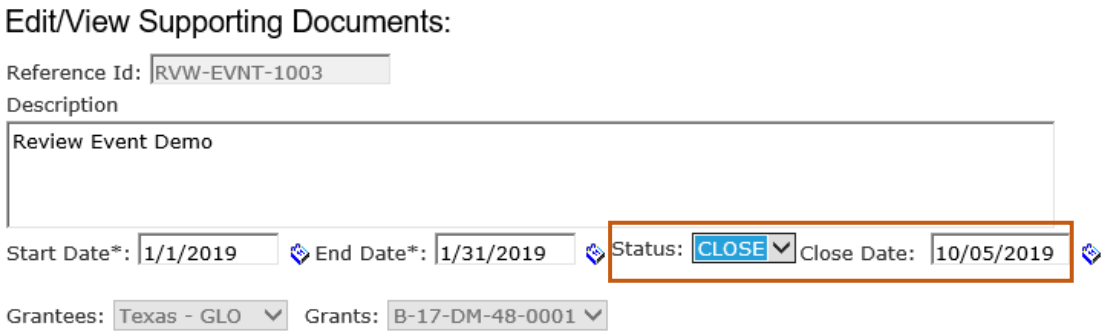
d) Select the hyperlinked **<Voucher Number>** on the review event page to open the voucher.

User Role: HUD User	**Menu Option:** Search Document Review



Follow steps in Option 1 beginning at Step (d) to complete the process.

3 To close a review event, HUD Users change the status of the review to "Close" on the **"Edit/View Supporting Documents"** page. When closing a review event, DRGR will automatically populate the closed date field on the review.



E. Grantee Submission of Supporting Documentation Following HUD Request

Following a request from HUD for supporting documents, Grantees will need to access the voucher with the request and submit the supporting documents to HUD.

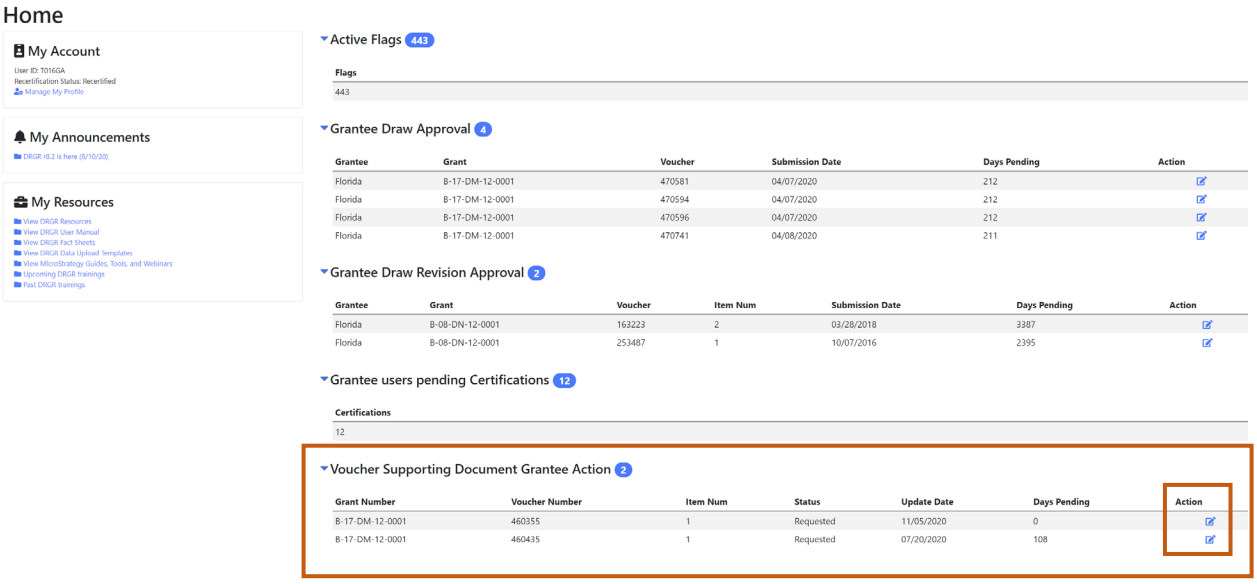
E1. Grantee | Submission of Documentation Following HUD Request

User Role: Draw Requestor	**Menu Option:** Search/Maintain Vouchers
Purpose: Allow Grantee Users to attach supporting documentation following a HUD request for documentation.	

User Role: Draw Requestor	**Menu Option:** Search/Maintain Vouchers

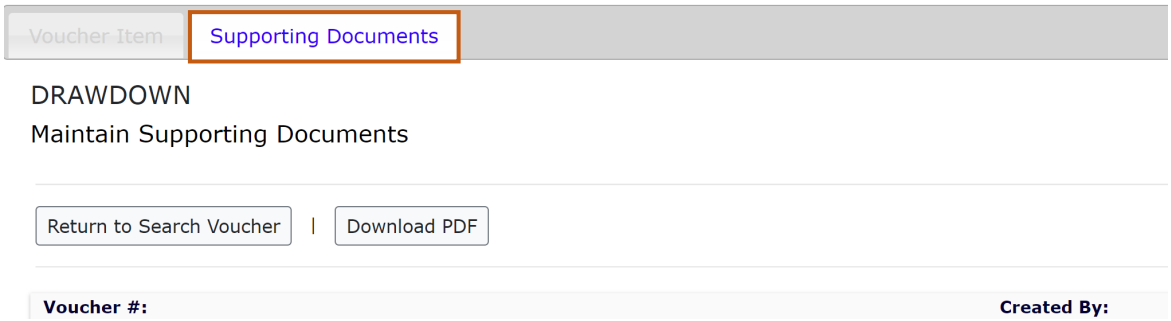
Complete the following steps to attach supporting documentation in response to a HUD request:

1 When HUD requests supporting documentation for a voucher line item (See Section D1 and D2 above), the Grantee User will receive an email and a To-Do item will display on the **"Home"** page. Users may select the edit icon in the "Action" column to be directed to the voucher requiring supporting documentation. The user may also use the search function described in Section B1 above and search for vouchers with a "Supporting Document Status" of "Requested."



2 In the search criteria, choose "Requested" from the dropdown for "Supporting Document Status."

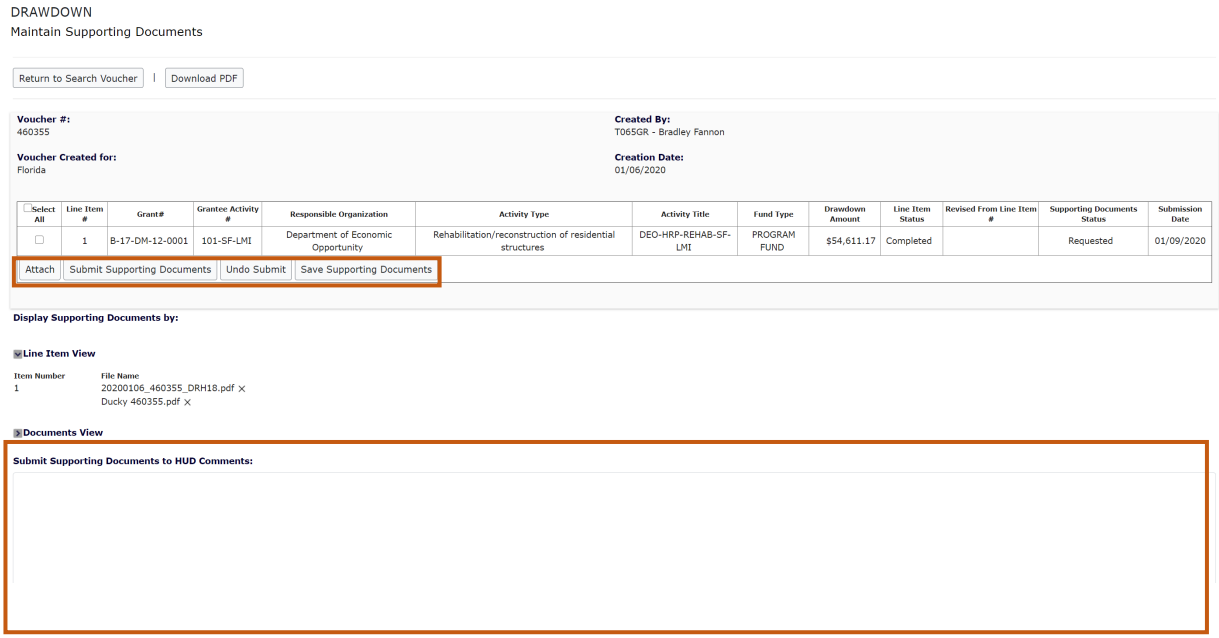
3 On the **"Maintain Voucher"** page, select the "Supporting Documents" tab.



4 On the "Supporting Documents" tab, comments can be entered in the "Submit Supporting Document to HUD Comments" field. Select **<Attach>** and attach the required documentation. After all document files are attached to the voucher line items, Grantees can submit the documentation request back to HUD Users by selecting the item and **<Submit Supporting Documents>.**

User Role: Draw Requestor	**Menu Option:** Search/Maintain Vouchers

Multiple documents can be attached to the same line item. Also, the same document file can be attached to multiple voucher line items.



The remainder of this page is intentionally left blank.

Chapter 30: RESERVED

This Chapter is reserved for a future release.

Chapter 31: Closeout| Manage My Grants Module

Chapter 31: Closeout | Manage My Grants Module 1

A. Manage My Grants Module Access 2

A1. Grantee | Grants 2

A2. HUD | Grants 3

B. Grantee | Request Grant Closeout 3

C. HUD | Review Closeout Checklist 6

C1. HUD | CPD Representative Closeout Checklist Review and Approval 6

C2. HUD | Field Office Manager or Super User Checklist Review and Approval 8

D. Grantee and HUD | View Review Checklist 10

Chapter 31: Closeout | Manage My Grants Module

This Chapter describes the workflow for Grantee Users and HUD Users to review and closeout a Grant in DRGR.

HUD Enables Closeout Request Function
The request grant closeout function is available if enabled by HUD for the appropriation or Grant/Award in DRGR.

TIP! To confirm whether the closeout function is enabled, lock the selected grant, select View Grant under Manage My Grants, and note the Closeout field.

Grantee Requests Closeout
When authorized by HUD or by the award terms and conditions, Grantee Admin Users can submit a Grant Closeout Request.

CPD Representative Enters Closeout Checklist
CPD Representatives can enter the closeout checklist, provide comments, and attach relevant documents during the closeout document review.

PROGRAM POLICY RECOMMENDATION: Upon initial closeout, the grant status for Neighborhood Stabilization Program Grants will be "Closed with Ongoing Reporting" rather than "Closed."

CPD Representative Complete Review
CPD Representatives notify the appropriate Field Office Managers and Super Users that the Review Checklist has been completed and is ready for their review.

Field Office Managers Review Checklist
Field Office Managers can review checklists, provide approver comments, and attach relevant documents. If approved, the System changes the status of the Grant to "Ready for Closeout" and notifies Super Users via email that the Grant status has been modified.

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

Grantee Users

Menu Option	Subsection	Action
Closeout Grant	B	Request Grant closeout
View Grant	D	View only access to review closeout checklist

HUD Users

Menu Option	Subsection	Action
Closeout Grant	C	Access review checklist for Grants
View Grant	D	View only access to review closeout checklist

A. Manage My Grants Module Access

The **Manage My Grants** module contains access to Grants.

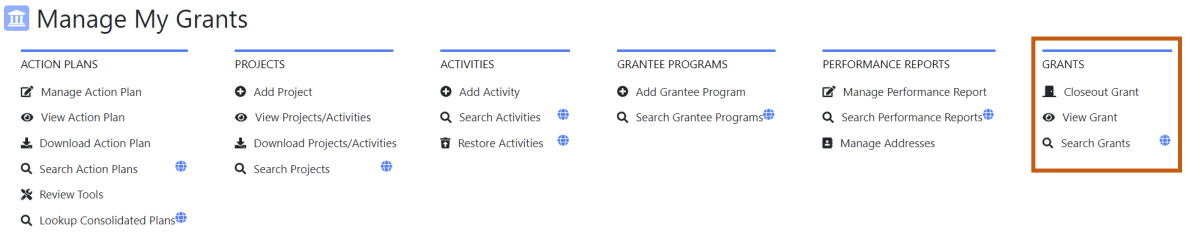
A1. Grantee | Grants

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Grant actions.	

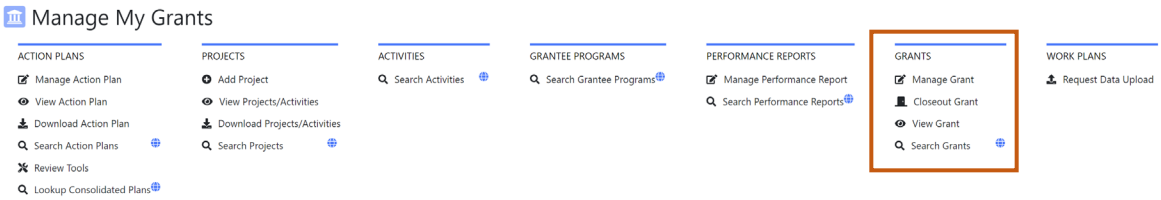
Complete the following steps to access the Manage My Grants Module:

1 In the DRGR application, navigate to the **Manage My Grants** module or icon, located in the Navigation Bar.

2 This opens the dropdown menu items for the **Manage My Grants** module with various subheadings. The **Grants** menu appears to the very right of the dropdown menu. The System displays the relevant menu items based on user type and user roles.



A2. HUD | Grants

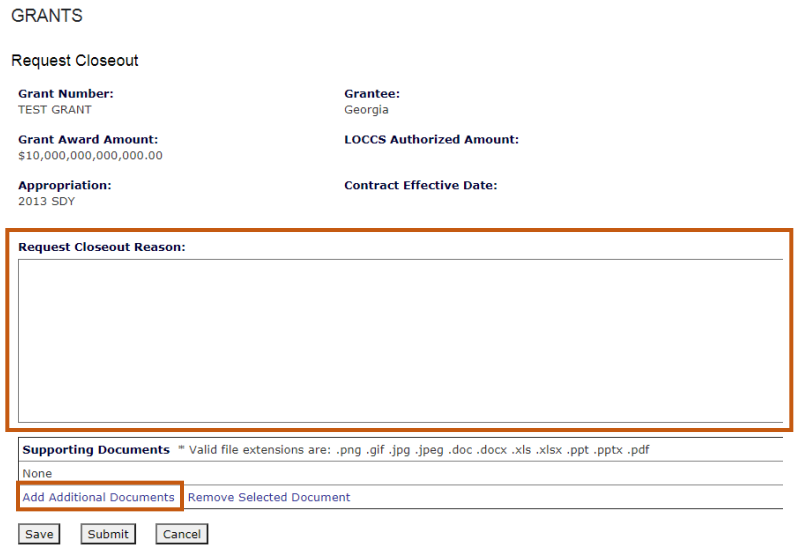
User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Grant actions.	
✔ Complete the following steps to access the Grant Management: Grants Module:	
1 In the DRGR application, navigate to the **Manage My Grants** module, or icon, located in the Navigation Bar.	
2 This opens the dropdown menu items for the **Manage My Grants** module with various subheadings. The Grants menu appears to the right of the very right of the dropdown menu. The System displays the relevant menu items based on user type and user roles. 	

B. Grantee | Request Grant Closeout

If HUD has enabled the functionality for the Grant, Grantee Users with the Administrator role can proactively initiate the Grant closeout process by submitting a Grant Closeout Request. See Chapter 5 – User Management and Certifications for more information on user roles.

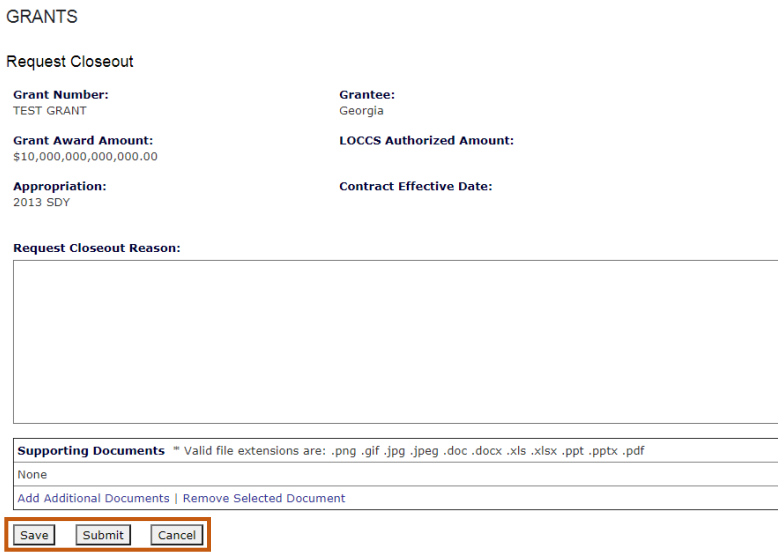
User Role: Grantee User	**Menu Option:** Closeout Grant
Purpose: Allow Grantee Users to initiate the Grant closeout process.	
✔ Complete the following steps to request Grant closeout:	
1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Request Closeout"** page will load for the "Selected Grant" in the Navigation Bar.	
2 On the **"Closeout Grant"** page, Grantee Users enter comments in the text box under "Request Closeout Reason." Supporting Documents are attached using the **<Add Additional Documents>** link.	

User Role: Grantee User	**Menu Option:** Closeout Grant



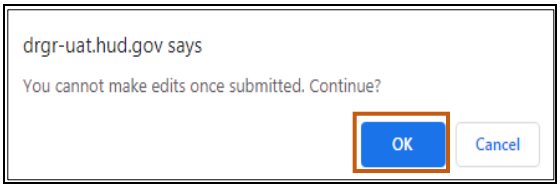
3 The Grantee User can select **<Save>** to save their comments and attachments and continue the process at a later time. Selecting **<Submit>** submits the comments and attachments for CPD Representative or Field Office User review. Selecting **<Cancel>** will close the window without saving any comments or attached supporting documents.

TIP! After selecting **<Submit>**, the user can neither make additional edits, nor submit again. They can, however, view their submission and save it as a PDF.

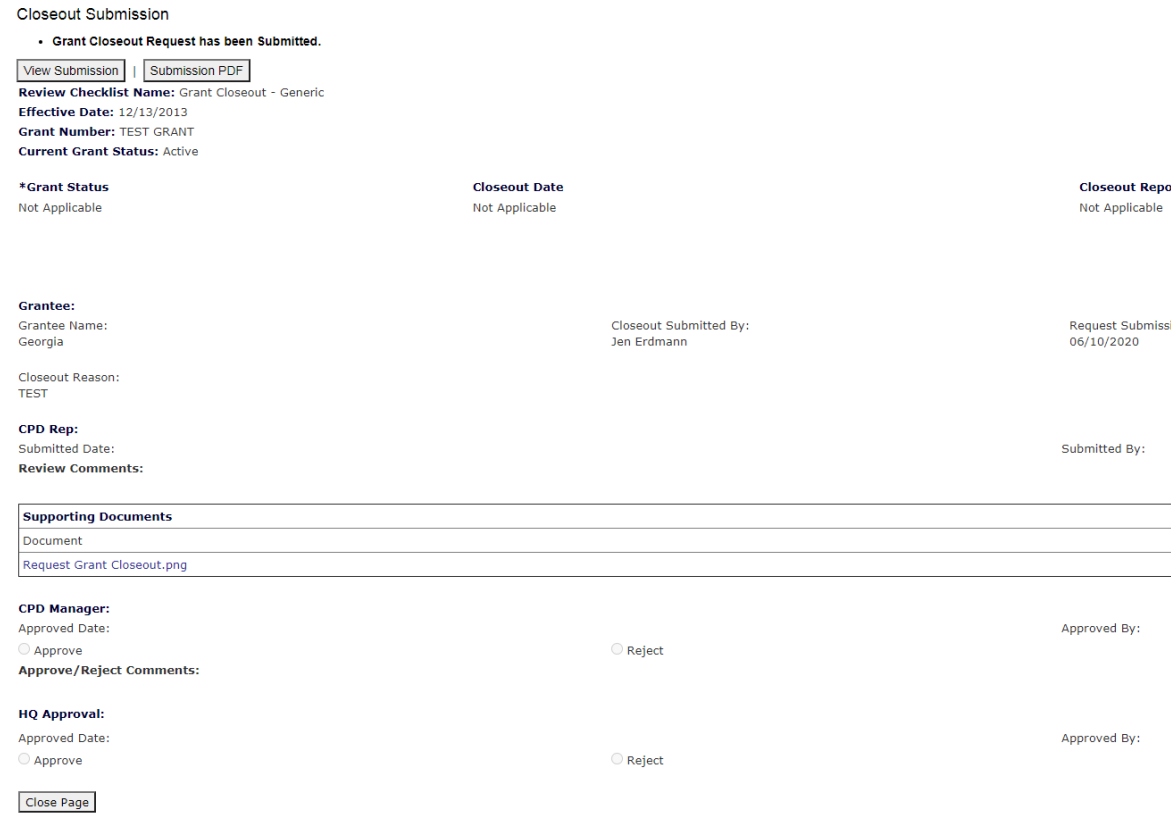


User Role: Grantee User	**Menu Option:** Closeout Grant

4 If the Grantee User selects **<Submit>**, DRGR will prompt the User with a warning that edits cannot be made after submission. Selecting **<OK>** confirms submission of the Grant Closeout Request and will take the user to the **"Closeout Submission"** page.



5 The **"Closeout Submission"** page provide the Grantee User with view only information on the Closeout Request.



The remainder of this page intentionally left blank.

C. HUD | Review Closeout Checklist

CPD Representatives can enter checklists, provide comments, and attach relevant documents during the closeout document review. After the CPD Representative review and approval, the checklist is reviewed by the Field Office Manager or Super User for final review and closeout.

C1. HUD | CPD Representative Closeout Checklist Review and Approval

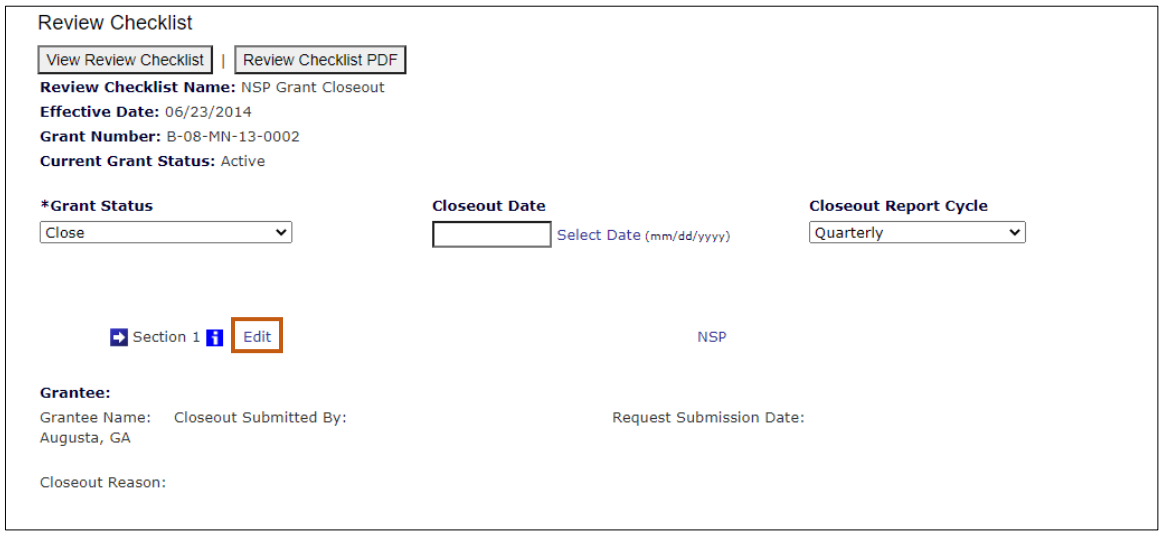
User Role: HUD User	**Menu Option:** Closeout Grant
Purpose: Allow HUD Users to access review checklist	

Complete the following steps to access the "Review Checklist" page:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Review Checklist"** page will load for the "Selected Grant" in the Navigation Bar.

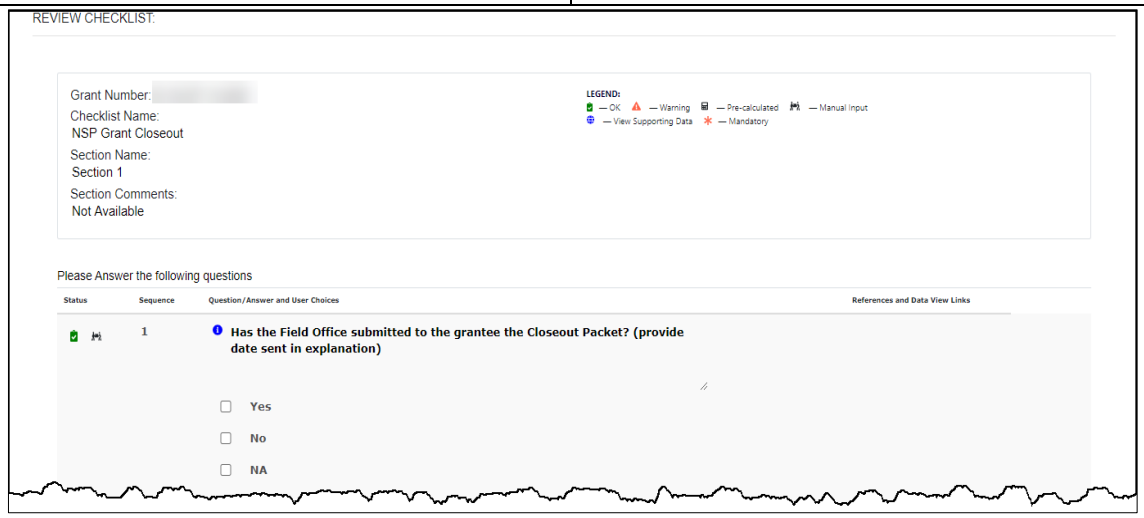
TIP! Only CPD Representatives for the Grant, Field Office Managers, and Super Users have access to the **<Grant Closeout>** link.

2 On the **"Review Checklist"** page, HUD Users select the **<Edit>** link next to any listed review sections.



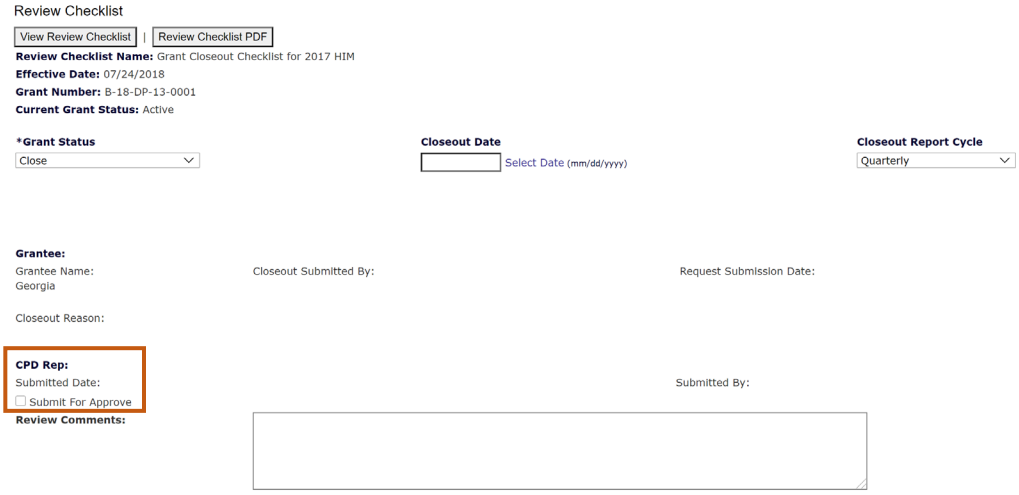
3 The **"Review Checklist – Section"** page is displayed. CPD Representatives can provide answers and comments to the checklist questions. In cases where there are no sections for editing, questions will not be displayed but the user can still provide comments and attach documents. The legend icons are described in the "Checklist Legend Icon Description" chart at the end of this Chapter. CPD Representatives must complete the **"Review Checklist – Section"** page in accordance with guidelines. Guidelines can be accessed by selecting the URLs associated with the "Section(s)" or each associated question. Checklists are not solely question and answer based and may require user inputs.

User Role: HUD User	**Menu Option:** Closeout Grant

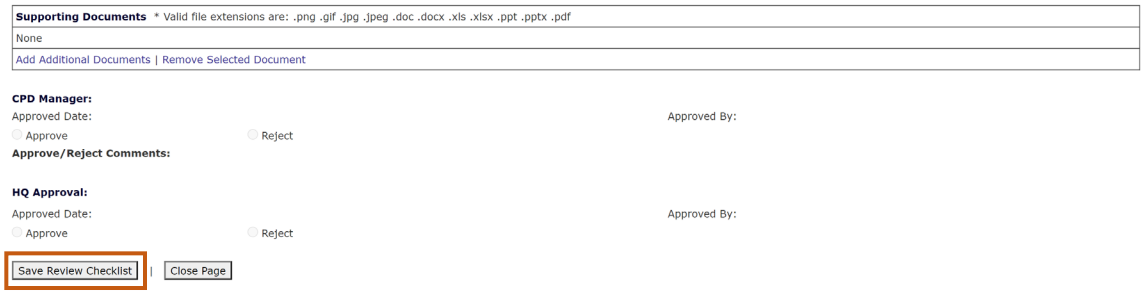


4 Users select **<Save>** to save the checklist edits. This action returns the user to the **"Review Checklist"** page. Select **<Save Review Checklist>** once all review sections are completed. To submit the checklist for Field Office Manager or Super User approval, select the check box next to "Submit for Approve" before selecting **<Save Review Checklist>.**

TIP! CPD Representatives cannot edit the Review Checklist after they have submitted the Review Checklist, or when the Grant status is changed to "Ready to Close" or "Closed."



User Role: HUD User	**Menu Option:** Closeout Grant



C2. HUD | Field Office Manager or Super User Checklist Review and Approval

Field Office Managers and Super Users can review checklists, provide approver comments, and attach relevant documents. On Field Office Manager's approval of the Review Checklist, the System changes the status of the Grant to "Ready for Closeout" and notifies Super Users via email that the Grant status has been modified. Field Office Managers and Super Users follow the steps below to review and approve checklists.

User Role: HUD User	**Menu Option:** Closeout Grant

Purpose: Allow HUD Users to access review checklist

Complete the following steps to access the "Review Checklist" page:

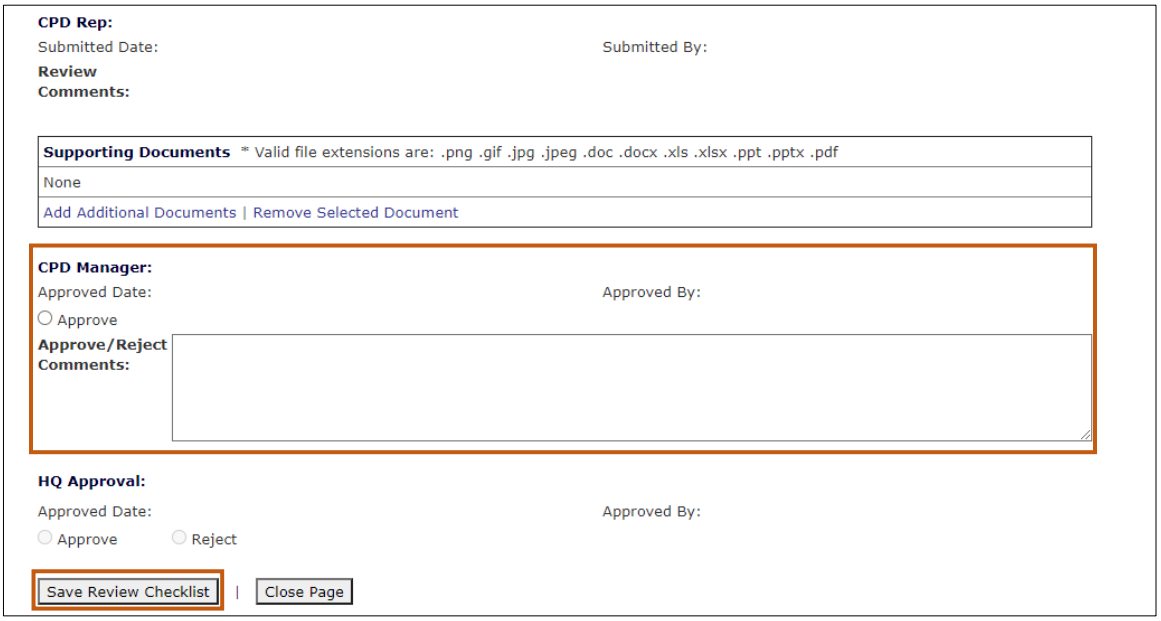
1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Review Checklist"** page will load for the "Selected Grant" in the Navigation Bar. Follow steps in Section C1 above to make edits to the checklist, if necessary.

TIP! Only CPD Representatives for the Grant, Field Office Managers, and Super Users have access to the **<Grant Closeout>** link.

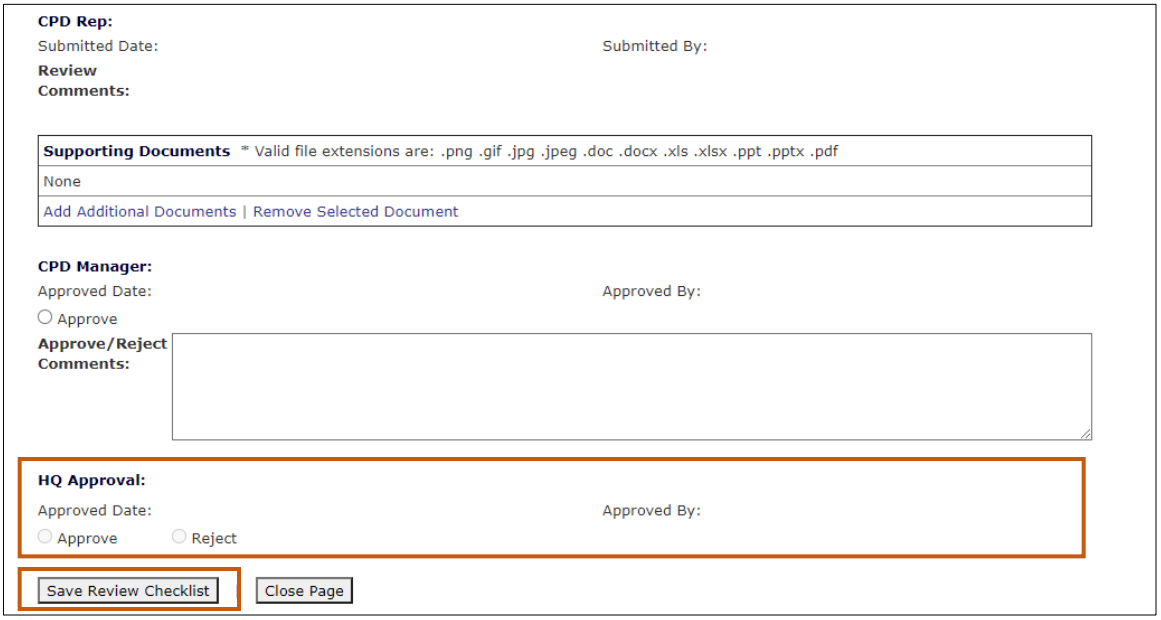
2 For Field Office Managers, on the **"Review Checklist"** page, Field Office Managers can provide comments in the "Approve/Reject Comments" narrative section. If the CPD Representative is also the Field Office Manager, then the System allows the User to enter "Review" and "Approve" comments upon initial review. Select the **<Approve>** or **<Reject>** radio button. Selection of **<Approve>** changes the status of the Grant and locks the screen for any further edits. Select **<Save Review Checklist>** to have the System notify Super Users of the need for approval.

The remainder of this page intentionally left blank.

User Role: HUD User	**Menu Option:** Closeout Grant

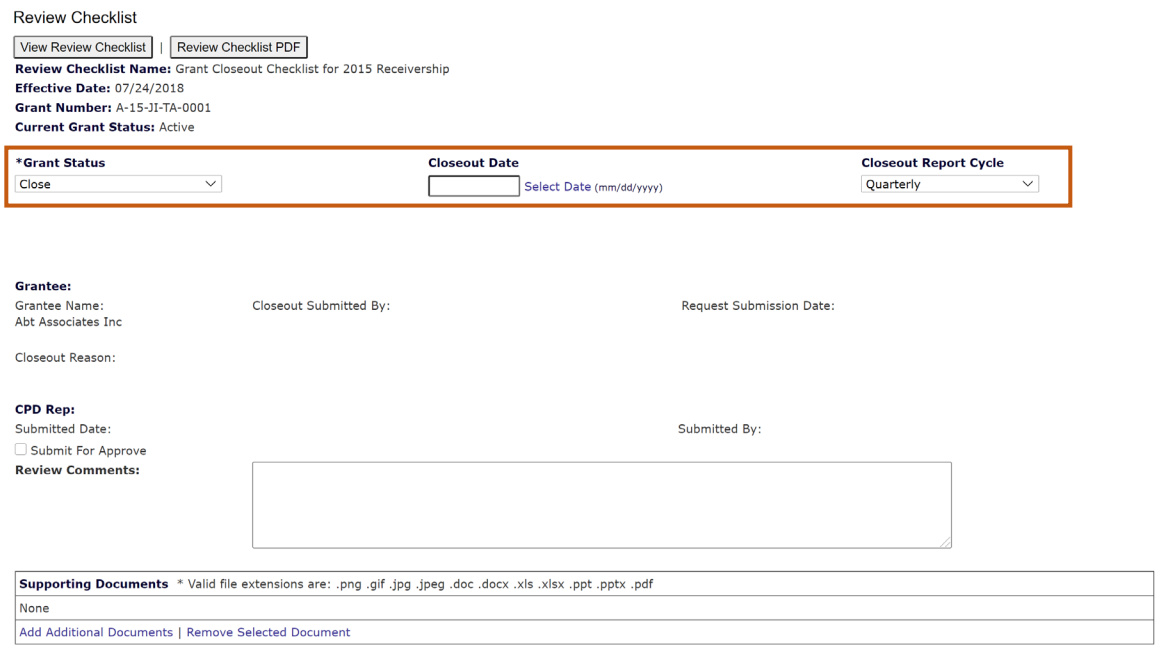


3 For Super Users, on the **"Review Checklist"** page, Super Users can "Approve" or "Reject" the checklist using the **<Approve>** or **<Reject>** radio button. Select **<Save Review Checklist>** to save changes.



User Role: HUD User	**Menu Option:** Closeout Grant

4 Super Users can select the Grant status from the "Grant Status" dropdown, enter a closeout date in the "Closeout Date" field, and select a reporting cycle from the "Closeout Report Cycle" dropdown.



D. Grantee and HUD | View Review Checklist

All users can access a view only screen to review checklists and see complete questions and comments.

User Role: Grantee User and HUD User	**Menu Option:** View Grant

Purpose: Allow Grantee Users and HUD Users to view review checklist

Complete the following steps to view the "Review Checklist" page:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<View Grant>** link. The **"View Grant"** page will load for the "Selected Grant" in the Navigation Bar.

2 On the **"View Grant"** page, select the **<View Review Checklist>** link to view the checklist.

The remainder of this page intentionally left blank.

User Role: Grantee User and HUD User	**Menu Option:** View Grant

GRANTS
View Grant

View Grant History | View Review Checklist | Review Checklist PDF | Grant Closeout Checklist

Grant Number :
TEST GRANT

Grant Name:
TEST GRANT

3 On the **"View Review Checklist"** page, users can see information completed in HUD's review. Select **<Close>** to close the page.

View Review Checklist

Close

Appropriation Code: 2013 SDY

Grant Number: TEST GRANT

Component: GRANT_CLOSEOUT

Name: Grant Closeout - Generic

Program Requirement Category: PSPECRULES

Effective Date: 12/13/2013

Mandatory: No

Narrative:

Supporting Documents
Document
Request Grant Closeout.png

Submitted Date: Submitted By:

Comments

Approved Date: Approved By:

The remainder of this page intentionally left blank.

Checklist Legend Icon Descriptions

* — Mandatory	Mandatory questions are annotated on the **"Edit Checklist"** page with a red asterisk. Review checklists cannot be submitted if the user has not responded to all mandatory questions.
— Warning	Questions that are mandatory and do not have a response will be displayed with a warning icon.
— Pre-calculated	Some question responses may be auto-computed by the System. If a response to a checklist question is auto-computed, then the System displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
— Manual Input	Non-auto-computed question responses are depicted with the Manual Input icon.
— View Supporting Data	Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. On selection of this icon, the System will open a new page to display the supporting data.

The remainder of this page intentionally left blank.

Chapter 32: Flags | Manage My Compliance Module

Chapter 32: Flags | Manage My Compliance Module 1

A. Manage My Compliance Module Access 2

A1. Grantee | User Access 2

A2. HUD | User Access 3

B. Grantee and HUD | Grantee and HUD Search for Flags 3

C. Grantee |Resolve and Remediate Active Flags 7

C1. Resolve Active Flags 8

C2. Remediate Active Flags 11

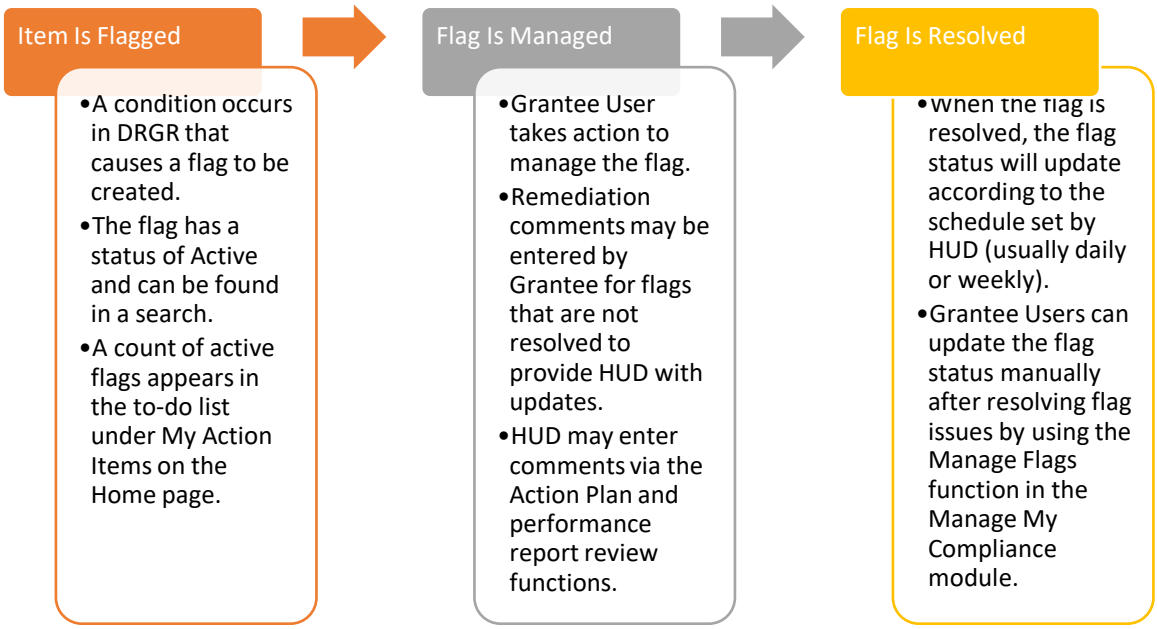
Chapter 32: Flags | Manage My Compliance Module

This Chapter provides information on purpose and function of managing flags in the **Manage My Compliance** module. It explains how to access and manage the compliance flags.

The ultimate purpose of flags is to provide Grantee and HUD Users with information related to compliance, reporting accuracy and completeness, issues with timeliness, and other useful information. Flags are meant to be quality control tools that alert users to items in DRGR that should be addressed. Items that may be flagged in DRGR include projects, activities, performance measures, Action Plans, Performance Reports, Workplans, and Grants. Items may be flagged as 'At-Risk' or because they fail to meet certain compliance criteria. The criteria used to flag items in DRGR are configurable by HUD within the DRGR System. HUD can fine-tune criteria, implement new criteria, and enable or disable certain flagging criteria. HUD can add, edit, or remove flags at any time without a DRGR release. HUD will notify users when changes are made and new flags are added.

Flags are generated and checked on a schedule set by HUD, and they will remain in an Active status until a Grantee resolves the condition that caused the flag to be generated. Flags cannot be deleted by Grantee Users or CPD Representatives. They can be resolved and changed to a Completed status, or they can be remediated with comments. Flags should be managed pursuant to the workflow that follows.

DRGR Flag Workflow



Grantee Users can review active flags and remediation comments that HUD Users will see during their review by clicking on "Review Tools" in the Action Plan or Performance Report. (See Chapter 15 for Action Plan Review Tools and Chapter 21 for Performance Report Review Tools.) Using Review Tools helps Grantee Users doublecheck that all resolved flags have been cleared into inactive status and all other active flags have accurate remediation comments. HUD Users also can add comments to flags.

Although HUD encourages Grantees to review, manage, and resolve flags for quality control purposes, resolving all flags prior to Action Plan and Performance Report submission is not an overall requirement of the DRGR System and will not prevent submission of the Action Plan or Performance Report for HUD review. Grantees, however, will not be able to closeout their Grant until all flags are resolved.

Grantee Users

Feature	Subsection	Location
Search Flags	B	Search for flags.
Search Flags	C1	Resolve active flags.
Search Flags	C2	Remediate flags.

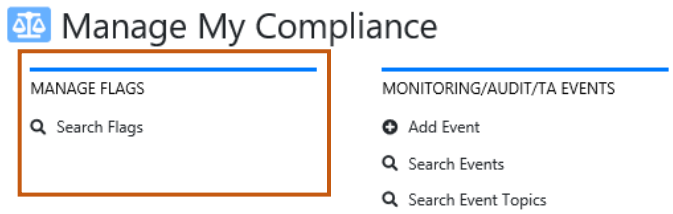
HUD Users

Feature	Subsection	Location
Search Flags	B	Search for flags.

A. Manage My Compliance Module Access

A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Compliance
Purpose: Allow Grantee Users to access compliance flags.	
1 In the DRGR application, select the **Manage My Compliance** module, indicated by the icon, located in the navigation menu. For best results, ensure the desired Grant and Grant number is locked in the navigation bar locked located above, prior to selecting **Manage My Compliance**.	
2 This opens the dropdown menu items for the **Manage My Compliance** module. The System displays the relevant menu items based on user type and user roles select.	



A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Compliance
Purpose Allow HUD Users to access the Grantee compliance flags.	

1 In the DRGR application, select the **Manage My Compliance** module, indicated by the icon, located in the navigation menu. For best results, ensure the desired Grant and Grant number is locked in the navigation bar locked located above, prior to selecting **Manage My Compliance**.

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

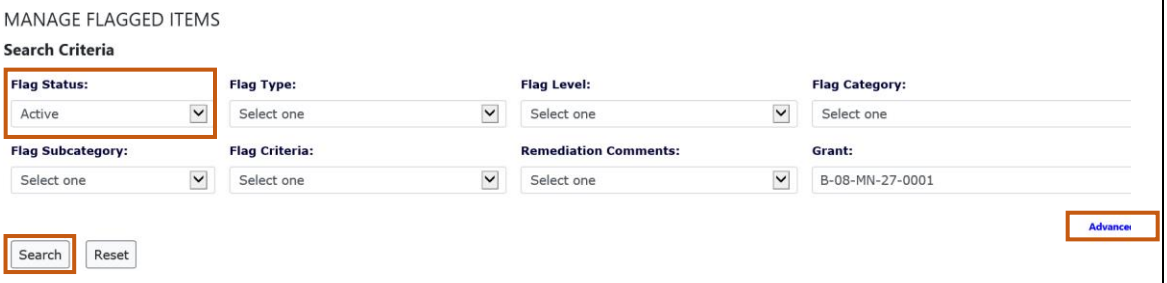
B. Grantee and HUD | Grantee and HUD Search for Flags

The steps below allow a user to search for flags for a selected Grant.

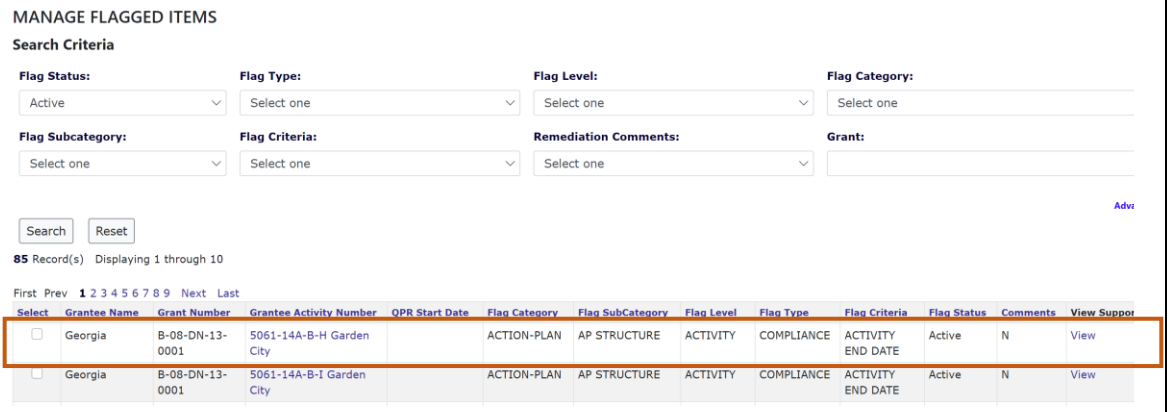
User Role: Grantee and HUD User	**Menu Item:** Search Flags
Purpose: Allow Grantee users to search for flags previously generated by the DRGR System.	

1 Navigate to the **Manage My Compliance** module, then locate the Flags menu. Select **<Search Flags>**. The **"Manage Flagged Items"** page will load for the "Selected Grant" in the Navigation Bar.

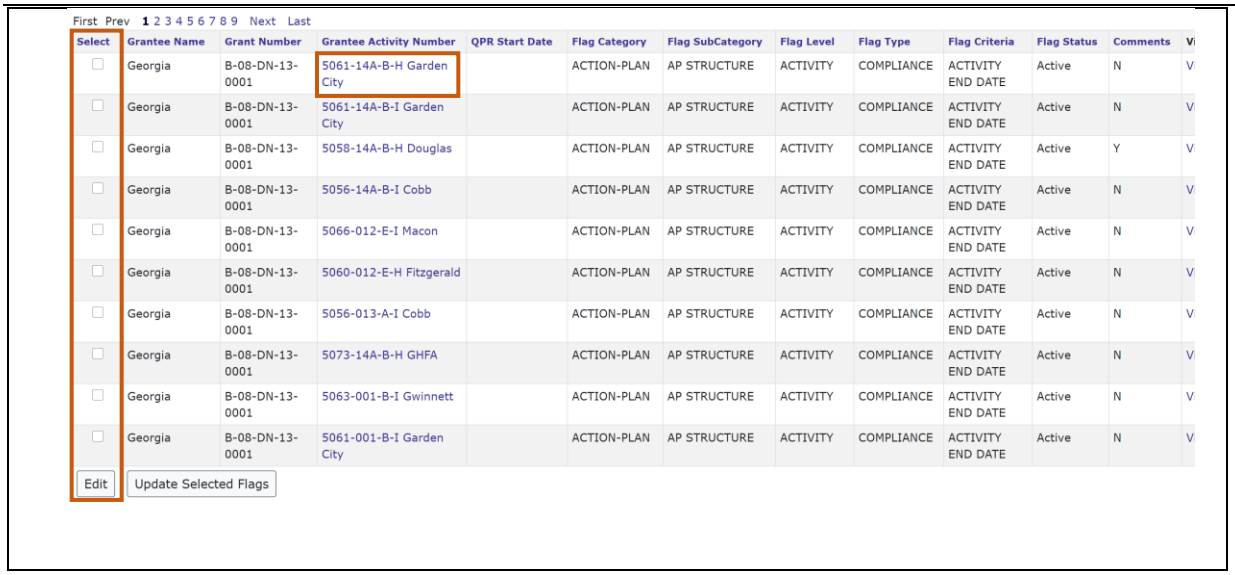
2 On the **"Managed Flagged Items"** page, the "Search Criteria" field auto-populates to "Active." Performing a search without selecting further criteria will result in a return of all active flags for the selected Grant. If desired, choose from the dropdown to search for different flag statuses and enter any additional information to refine the search. Select the blue **<Advanced Search>** link to open a dropdown of additional search constraints. For a description of all search criteria, see the "Search Criteria Description" chart at the end of this section. Select **<Search>** to retrieve search results.



3 Selecting **<Search>** refreshes the page and populates a table below with results. Search results are displayed with 10 per page in a table. The table headings are selectable to better sort the results. Choosing them repeatedly will switch between and ascending and descending sort for the selected row. Navigate between pages via the page number links and **<Next>** or **<Last>** links at the bottom of the page.



4 To view the flag and the conditions that caused the flag to be generated, select the check box next to the desired flag or flags and select **<Edit>** at the bottom of the page. Alternatively, select the blue hyperlinked activity number. The **"Edit Remediation Comments"** page will load.



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

Select	Grantee Name	Grant Number	Grantee Activity Number	QPR Start Date	Flag Category	Flag SubCategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Comments	Vi
	Georgia	B-08-DN-13-0001	5061-14A-B-H Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5061-14A-B-I Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5058-14A-B-H Douglas		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	Y	V
	Georgia	B-08-DN-13-0001	5056-14A-B-I Cobb		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5066-012-E-I Macon		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5060-012-E-H Fitzgerald		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5056-013-A-I Cobb		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5073-14A-B-H GHFA		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5063-001-B-I Gwinnett		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V
	Georgia	B-08-DN-13-0001	5061-001-B-I Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	V

Edit Update Selected Flags

The remainder of this page intentionally left blank.

Search Function Descriptions

In order to more quickly locate specific flags, and especially when there are many results, it may be easier to narrow a flag search using the search constraints at the top of the page. A list of the basic and advanced search constraints and their functions follows.

TIP! Advanced constraints can be particularly helpful for HUD users who are searching through a wider universe of flags across many Grantees.

Basic Search Criteria	Functions
Flag Status	Filters by Active, Completed, or Acknowledged flags. Active flags are displayed by default.
Flag Types	Filters by 'At-Risk' or 'Compliance' flags.
Flag Levels	Filters for flags at the 'Grant' or 'Activity' levels.
Flag Categories	Filters for flags in either the 'Action Plan' or 'Performance Report.'
Flag Sub-Categories	Filters by subcategories of flags. HUD will communicate the rollout of new/updated flags and guidance on how to resolve them. The subcategories may be added/modified as new flags are rolled out. An example of a subcategory is 'DRAWDOWN'.
Flag Criteria	Filters by criteria of flags. As part of rollout of new/update of flags, new flag criteria may be added or existing criteria may be updated. An example of a flag criteria is 'NO DRAW FOR 1 YEAR' to identify activities where the Grantee has not initiated a draw for 1 year but there are funds remaining to be drawn on these activities.
Remediation Comments	Filters by flags that have had remediation comments entered. Choose 'YES' for flags with remediation comments and 'NO' for flags with no remediation comments.
Grant	Users may enter a Grant number to search for flags related to a specific Grant. **This field will be pre-populated with the currently locked Grant.**
Advanced Search Criteria	**Functions**
Program	Filters for NSP, DR CDBG, TA, RIP, NA, CB, or PFS Grants.
Appropriation Code	Users may enter an appropriation code for Grants that are related to specific appropriations.
Grant Status	Filters for Active, Closed, Closed with PI Active, Dormant, or Ready to Close. By default, only Active Grants are displayed.
Project	Users may enter the Project number to search by Project.
Grantee Activity #	Users may enter the Activity number to search by Activity.
QPR Date	Users may enter a date range for QPR periods using the format mm/dd/yyyy to search for flags applicable to a specific period.

Basic Search Criteria	Functions
Flag Completion Date	Users may enter a date range using the format mm/dd/yyyy to search for flags with completion dates in the specified range.
Flag Initiation Date	Users may enter a date range using the format mm/dd/yyyy to search for flags with initiation dates in the specified range.

C. Grantee |Resolve and Remediate Active Flags

Grantee Users should attempt to resolve flags, rather than remediate, prior to Action Plan or Performance Report submission. Resolving flags typically involves correcting the condition in the DRGR System that caused the flag to be created. In contrast, remediating the flag is entering a comment explaining why a flag cannot be resolved. The charts below titled "Resolve versus Remediate Flags" and "Flag Status" provide additional detail on how to address flags and the changes in status as flags are addressed.

TIP! Consult the "DRGR Flags Quick Guide" on the HUD Exchange for a comprehensive list of DRGR flags and resolution recommendations.

Resolve versus Remediate Flags

RESOLVE	REMEDIATE
Using the information in the flag, the Grantee navigates to the appropriate DRGR screen (often the Edit Action Plan, Drawdown, or QPR Activity screens) to resolve the flag.	If a Grantee cannot resolve a flag, then the Grantee can enter a brief comment explaining why the flag could not be resolved and a proposed timeline for resolution.

Flag Statuses

ACTIVE	COMPLETED	ACKNOWLEDGED
Flags are configured with conditions or criteria that, when met, cause an item to be flagged. These flags have a Flag Status of Active. An Active flag means the condition that caused the flag to be applied still exists in the System or the System has not updated. Users can manually update flag status after resolving conditions as described below in Section C1, Step 5.	When the condition that caused the flag is resolved, then the Flag Status changes to Completed. For example, an Active flag for an activity with an Underway environmental review status in DRGR will be changed to the Flag Status of Completed after the environmental review status is marked as Completed in the Action Plan.	Flag Status of Acknowledged is only applicable for Performance Report based flags. An Active flag is automatically changed to Acknowledged when the Performance Report is approved.

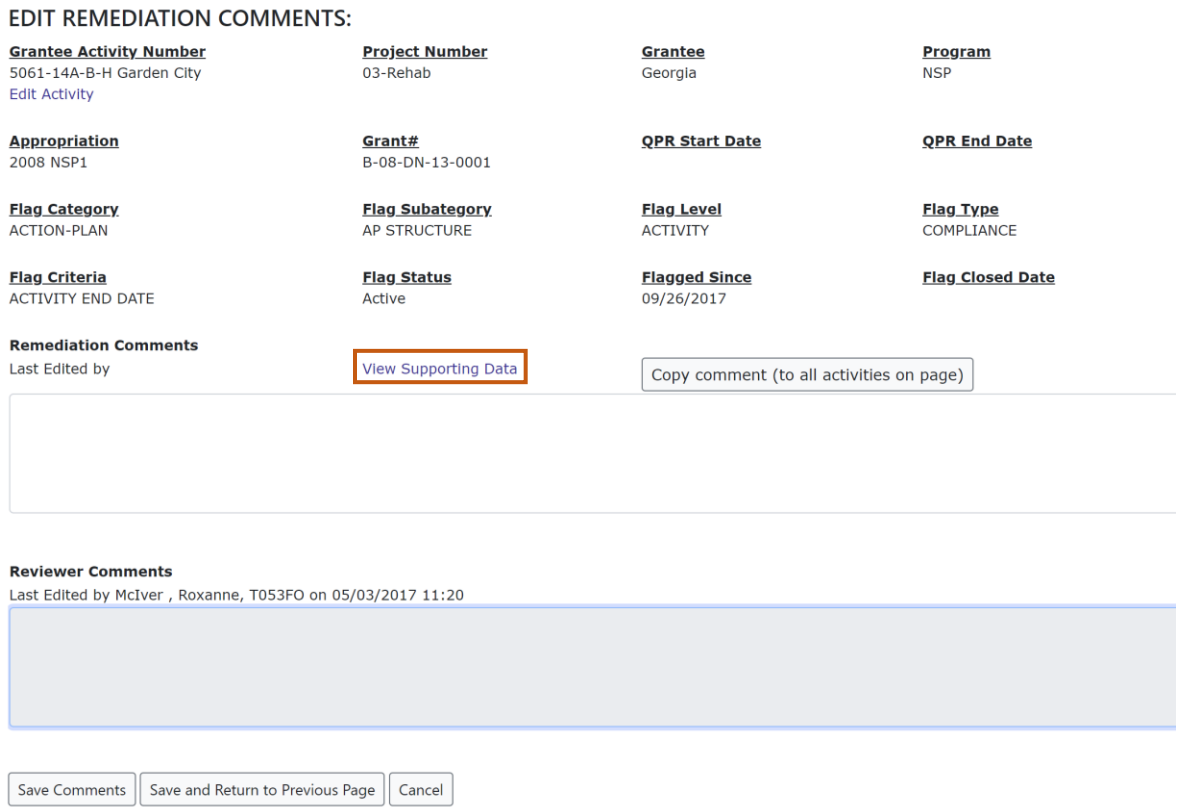
C1. Resolve Active Flags

This Section describes how to access flags to resolve them using the functions in the **Manage My Compliance** module. Resolving flags will require the Grantee User to take actions in other modules of DRGR depending on the condition that caused the flag. The "DRGR Flags Quick Guide" on the HUD Exchange provides a comprehensive list of DRGR flags and resolution recommendations throughout the modules.

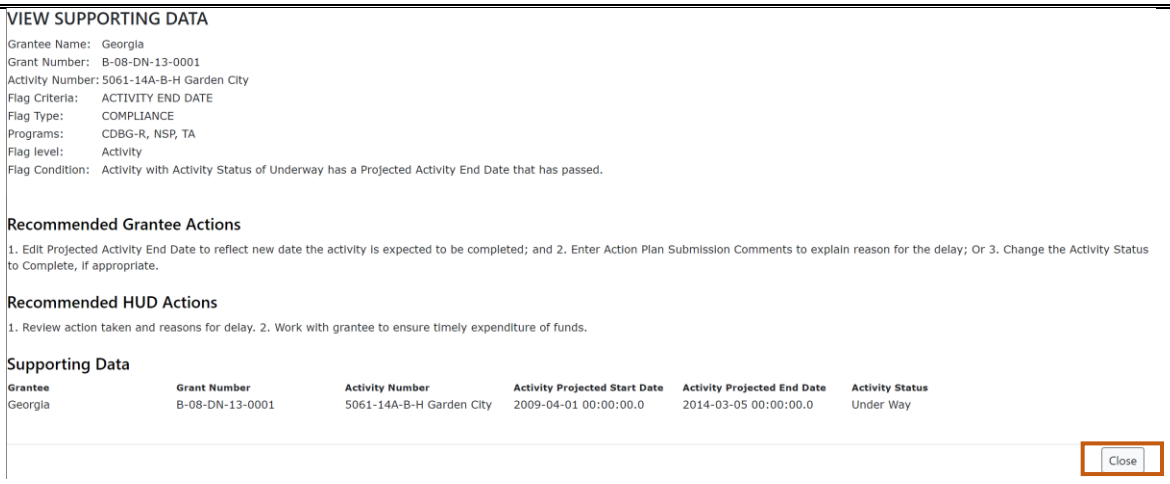
User Role: Grantee User	**Menu Item:** Search Flags
Purpose: Allow Grantee Users to search for and update flags while resolving them.	

1 Follow the steps to search for and access the selected active flag as described in Section B above.

2 On the **"Edit Remediation Comments"** page, the Grantee User will find information about the conditions that generated the flag, including the "Flag Criteria" and "Flag Type." Users can also select the **<View Supporting Data>** link. The **"View Supporting Data"** page will load.



3 On the **"View Supporting Data"** page, the User will find a summary of flag information as well as specific "Recommended Grantee Actions" to resolve the flag and "Recommended HUD Actions" to assist the Grantee. Select **<Close>** to close the window and return to the **"Edit Remediation Comments"** page.



VIEW SUPPORTING DATA

Grantee Name: Georgia
Grant Number: B-08-DN-13-0001
Activity Number: 5061-14A-B-H Garden City
Flag Criteria: ACTIVITY END DATE
Flag Type: COMPLIANCE
Programs: CDBG-R, NSP, TA
Flag level: Activity
Flag Condition: Activity with Activity Status of Underway has a Projected Activity End Date that has passed.

Recommended Grantee Actions

1. Edit Projected Activity End Date to reflect new date the activity is expected to be completed; and 2. Enter Action Plan Submission Comments to explain reason for the delay; Or 3. Change the Activity Status to Complete, if appropriate.

Recommended HUD Actions

1. Review action taken and reasons for delay. 2. Work with grantee to ensure timely expenditure of funds.

Supporting Data

Grantee	Grant Number	Activity Number	Activity Projected Start Date	Activity Projected End Date	Activity Status
Georgia	B-08-DN-13-0001	5061-14A-B-H Garden City	2009-04-01 00:00:00.0	2014-03-05 00:00:00.0	Under Way

Close

4 After reviewing the recommendations to resolve the flags, the Grantee User should complete the steps for resolution in the appropriate module.

If the flag relates to an Action Plan condition, the Grantee User can quickly access the activity by selecting **<Edit>** on the **"Edit Remediation Comments"** page. The System will direct the User to the **"Edit Activity"** page for that Activity where edits can be made. After the User saves the activity edits, the DRGR System will automatically return the User to the **"Edit Remediation Comments"** page. Select **<Save and Return to Previous Page>** to return to search results.

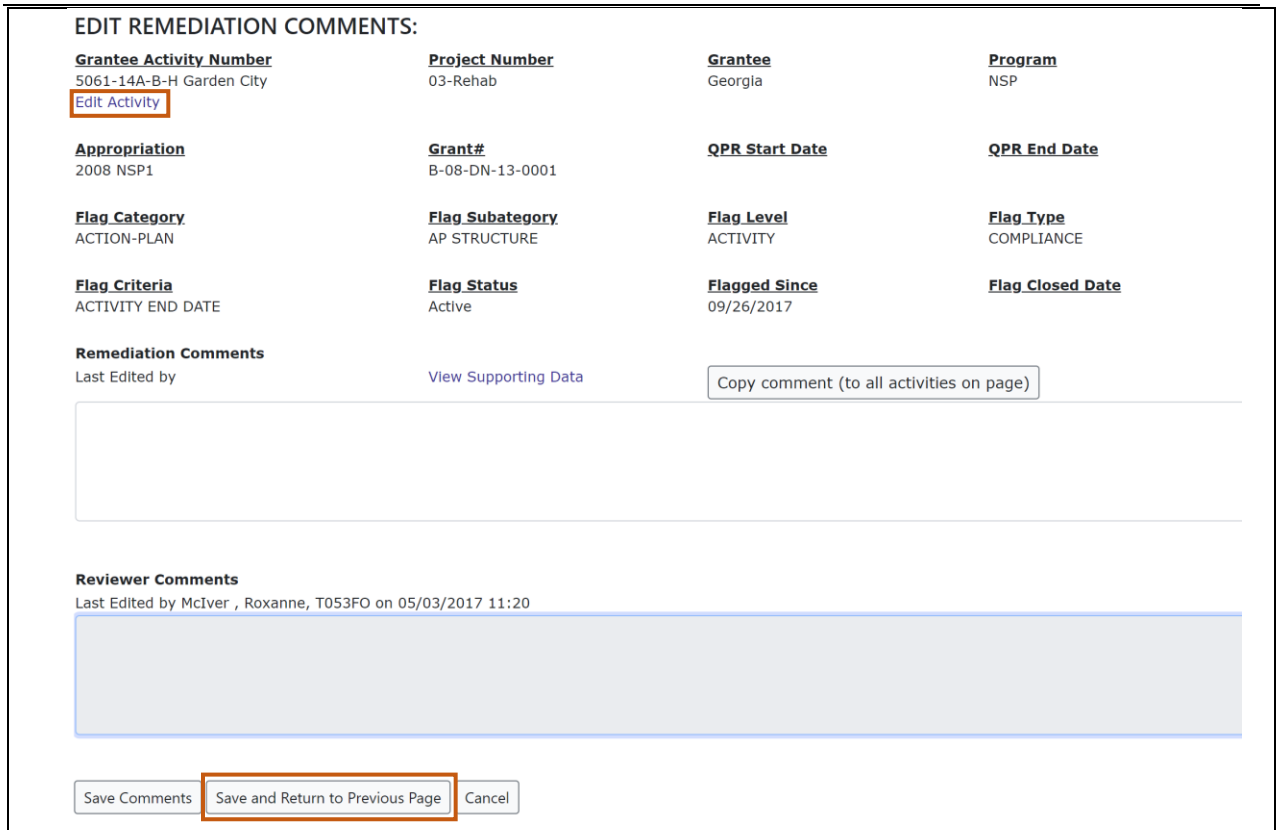
TIP! A Common Flag Example:

Flag: "Activity end date has passed but activity not completed"

Resolution Options: Change the activity status to "Completed", if appropriate. Alternatively, the activity end date can be changed

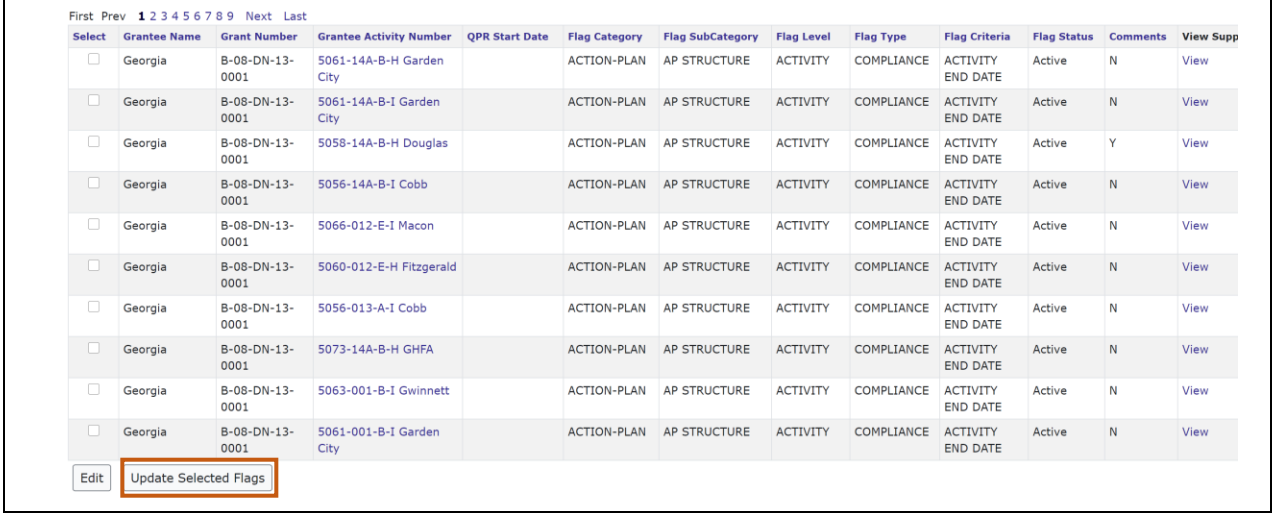
The DRGR Flags Quick Guide includes resolution recommendations for all flags.

The remainder of this page intentionally left blank.



5 Once the underlying condition has been fixed, the flag will be automatically changed to Completed on the next scheduled run of the flag conditions.

Alternatively, the user can have the System immediately check to see if the flag is resolved by selecting that flag's check box next to the selected flag in the search results on the left-hand side of the **"Manage Flagged Items"** page. Select **<Update Selected Flags>** at the bottom of the page. This will cause the page to refresh, and any selected flags that have had their underlying causes resolved will have their "Flag Status" change from "Active" to "Completed."



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

Select	Grantee Name	Grant Number	Grantee Activity Number	QPR Start Date	Flag Category	Flag SubCategory	Flag Level	Flag Type	Flag Criteria	Flag Status	Comments	View Supp
☐	Georgia	B-08-DN-13-0001	5061-14A-B-H Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5061-14A-B-I Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5058-14A-B-H Douglas		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	Y	View
☐	Georgia	B-08-DN-13-0001	5056-14A-B-I Cobb		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5066-012-E-I Macon		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5060-012-E-H Fitzgerald		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5056-013-A-I Cobb		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5073-14A-B-H GHFA		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5063-001-B-I Gwinnett		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View
☐	Georgia	B-08-DN-13-0001	5061-001-B-I Garden City		ACTION-PLAN	AP STRUCTURE	ACTIVITY	COMPLIANCE	ACTIVITY END DATE	Active	N	View

Edit Update Selected Flags

C2. Remediate Active Flags

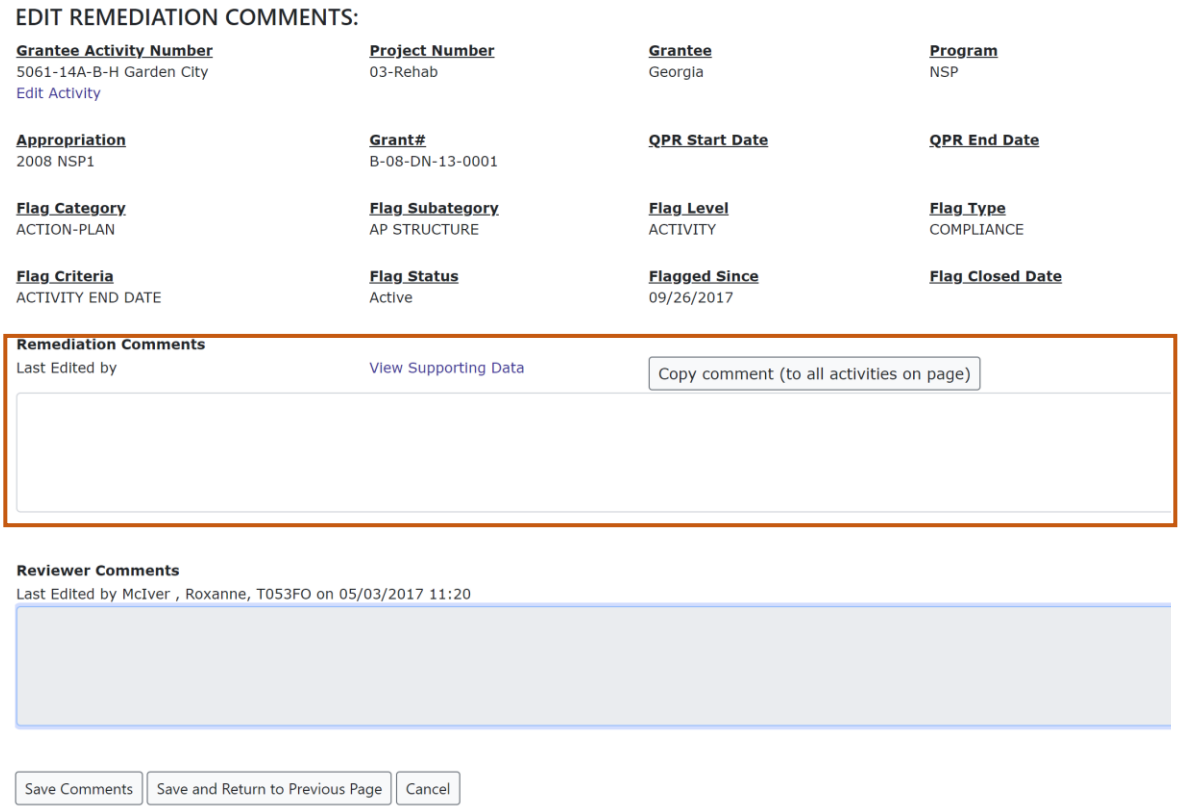
Grantee Users should, at a minimum, review and remediate active flags they cannot resolve by the time an amended Action Plan or Performance Report is submitted to HUD for review. Grantees remediate flags by entering a comment to explain why the flag cannot be resolved.

User Role: Grantee User	**Menu Item:** Search Flags
Purpose: Allow Grantee Users to search for and update flags while remediating them.	

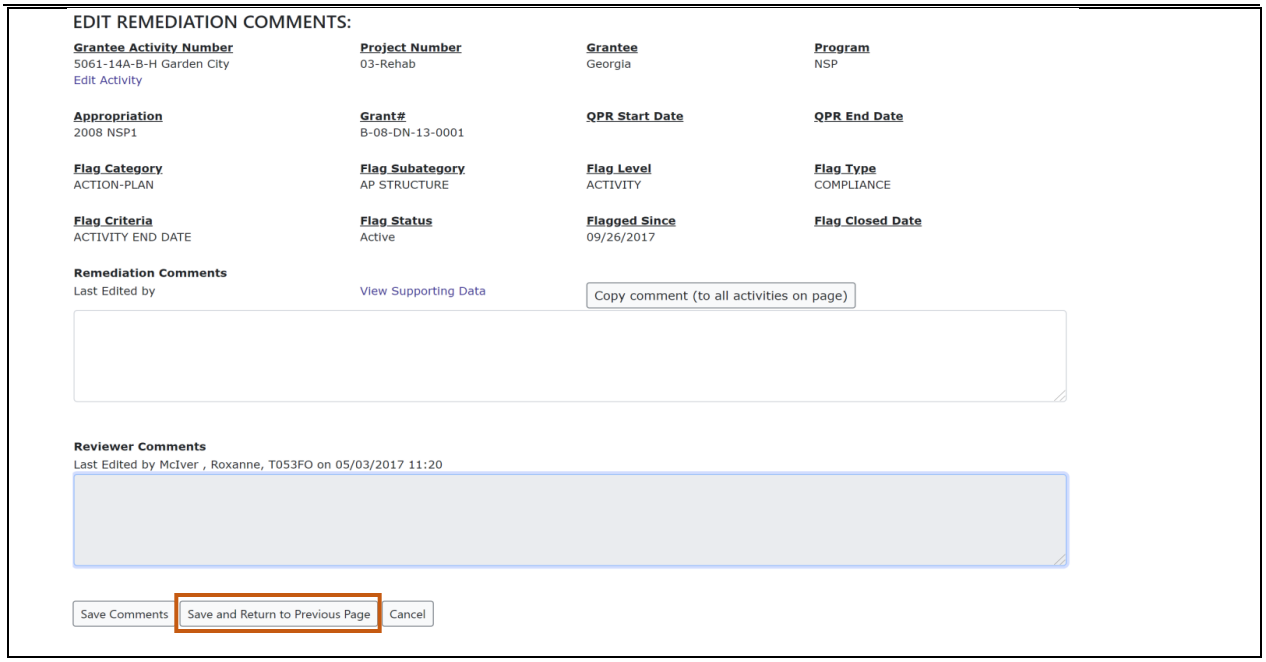
Complete the following steps to access and remediate flags:

1 Follow the steps to search for and access the selected active flags as described in Section B above. More than one flag can be selected for remediation. When selecting more than one flag from the search results, the **"Edit Remediation Comments"** page will display all selected flags.

2 On the **"Edit Remediation Comments"** page it displays all flags that were selected from the search results. Comments can be entered into the "Remediation Comments" text box individually on a flag by flag basis, or a user can copy the same comment to all the selected flags by selecting **<Copy comment (to all activities on page)>**.



3 After completing all comments, select **<Save and Return to Previous Page>** to return to search results.



The remainder of this page intentionally left blank.

Chapter 33: Monitoring/Audit/Technical Assistance Events | Manage My Compliance Module

Chapter 33: Monitoring/Audit/Technical Assistance Events | Manage My Compliance Module 1

A. (Manage My Compliance Module Access 3

A1. Grantee | User Access 3

A2. HUD | User Access 4

B. (Events, Findings, Concerns, and Topics 4

B1. Grantee | Add Monitoring/Audit/TA Events 4

B2. Grantee and HUD | Search and View/Edit Monitoring/Audit/TA Events 8

B3. Grantee | Add Findings 10

B4. Grantee | Add Concerns 13

B5. Grantee | Add Audit Topics 17

B6. Grantee | Add TA Topics 20

B7. Grantee and HUD | Search Event Topics 23

Chapter 33: Monitoring/Audit/Technical Assistance Events | Manage My Compliance Module

Grantees can record Monitoring, Audit, and Technical Assistance events in the Manage My Compliance module to provide a summary of critical management and oversight actions they carry out as part of meeting their responsibilities for day-to-day management of their Grant programs.

PROGRAM POLICY RECOMMENDATIONS: Certain appropriation laws require that Grantees and HUD identify how they are preventing fraud, waste, and abuse. The Manage My Compliance module is designed to allow grantees to provide this information through DRGR. Grantees should review their appropriation and consult with their HUD CPD Representative to understand the reporting requirements for their programs.

For most Grantees, HUD performs risk analysis monitoring in which HUD assigns scores based on the size of a Grantee's program, the number of subrecipients, and the capacity of the Grantee's staff, among other things. The **Manage My Compliance** module allows Grantees to contribute information to this analysis and to show how they are taking action to make their programs less risky and more effective. If a Grantee has a large number of subrecipients and contractors, HUD may consider the program more risky. On the other hand, if the Grantee is regularly providing technical assistance to and monitoring of its program partners, including following up on any findings, HUD is likely to consider some or all of the risk mitigated by appropriate management actions.

Thus, the data in the **Manage My Compliance** module helps Grantees and HUD develop a shared understanding of the steps Grantees are taking to ensure funds are used properly and to further the recovery or stabilization goals of their Grant programs and communities.

DRGR includes summary performance information regarding Grantee efforts in the areas of monitoring, audit, and technical assistance. This data can then be reviewed by HUD staff to examine the level of effort and results, assess risk associated with these Grants, and, in turn, direct HUD technical assistance and monitoring resources. This information identifies what activities have been reviewed or assisted and the results of these review and assistance visits. The Performance Report displays a summary table that shows the number of visits and reports within the reporting period and totals to date as shown below:

Monitoring, Audits, and Technical Assistance

	This Report Period	To Date
Monitoring Visits	4	12
Audit Visits	2	5
Technical Assistance Visits	3	9
Monitoring/Technical Assistance Visits	1	2
Report/Letter Issued	6	14

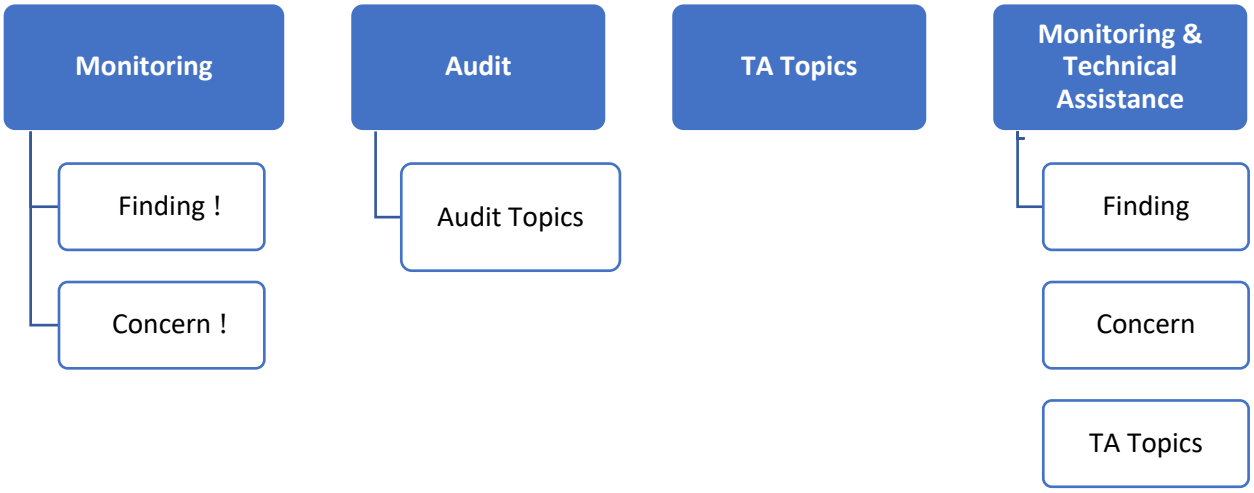
The section on Monitoring, Audits, and Technical Assistance in a Performance Report displays as soon as data is entered into it. Since the DRGR System calculates the number of visits and reports based on the dates entered, the QPR shows dates that fall under the current report period as well as all visits and reports to date.

It is important to remember that this compliance module is NOT a monitoring system in itself. It is only for reporting very basic summary level information about the number of visits and reports related to a Grantee's oversight of the activities funded under their Grants in the DRGR System. In general, the information requested on visits is limited to the dates of visits and reports as well as very high-level categories of compliance issues reviewed such as: national objective, eligible activities, financial management, and environmental review.

DRGR's **Manage My Compliance** module includes two basic levels of information:

- Events/Reports: Grantees enter the start and end dates of monitoring, audits, or TA visits as well as the date of reports. Grantees can also identify activities that have been reviewed or assisted as well as the major categories of topics covered in reviews or assistance.
- Findings/Concerns/TA Topics: Findings, concerns, and TA Topics are added to Events after the Events are created. Grantees should identify any findings and concerns made, as well as their status and corrective actions, in the main Events and Reports. For technical assistance, Grantees can identify the basic categories of topics covered.

Monitoring and TA Event Flow Chart



In monitoring and audit events, findings or concerns may be reported as resolved during the report process or left open. The DRGR's **Manage My Compliance** module allows Users to identify the status of findings and to note any follow-up action taken.

Grantee Users

Feature	Subsection	Location
Add Event	B1	Add Monitoring/Audit/TA Events
Search Events	B2	Search and View/Edit Monitoring/Audit TA Events
Search Events	B3	Add findings to an Event using the <Add Findings> link

Search Events	B4	Add concerns to an Event use the <Add Concerns> link
Search Events	B5	Add an audit topic to an Event using the <Add Audit Topic> link
Search Events	B6	Add TA topic to an Event using the <Add TA Topic> link
Search Event Topics	B7	Search and View/Edit Findings/Concerns/Audit Topics/TA Event Topics

HUD Users

Feature	Subsection	Location
Search Events	B2	Search and View Monitoring/Audit TA Events
Search Event Topics	B7	Search and View Findings/Concerns/Audit Topics/TA Event Topics

Manage My Compliance Module Access

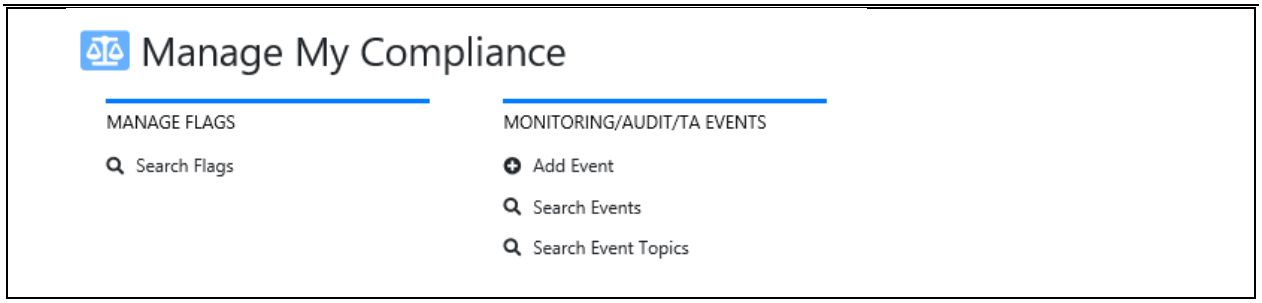
A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** **Manage My Compliance**
Purpose: Allow Grantee Users to access compliance tools for Monitoring/Audit/Technical Assistance events.	

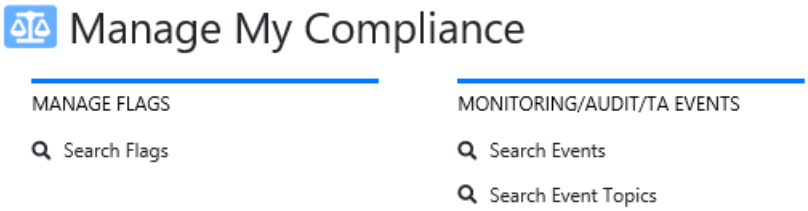
Complete the following steps to access the Manage My Compliance module:

1 Select the **Manage My Compliance** module, indicated by the icon, located in the navigation menu. For best results, ensure the desired Grant is locked in the navigation bar, prior to selecting **Manage My Compliance.**

2 This opens the dropdown menu items for the **Manage My Compliance** module. The System displays the **Monitoring/Audit/Technical Assistance** menu.



A2. HUD | User Access

User Role: HUD User	**Menu Option:** Manage My Compliance
Purpose Allow HUD Users to access compliance tools for Monitoring/Audit/Technical Assistance events.	
Complete the following steps to access the Manage My Compliance module:	
1 Select the **Manage My Compliance** module, indicated by the icon, located in the navigation menu. For best results, ensure the desired Grant is locked in the navigation bar, prior to selecting **Manage My Compliance**.	
2 This opens the dropdown menu items for the **Manage My Compliance** module. The System displays the **Monitoring/Audit/TA Events** menu. 	

B. Events, Findings, Concerns, and Topics

B1. Grantee | Add Monitoring/Audit/TA Events

User Role: Grantee User	**Menu Item:** Add Event
Purpose: Allow Grantee users to add events of the following types: Monitoring, Audit, TA, Monitoring/TA	
Complete the following steps to add a Monitoring/Audit/TA Event.	
1 Navigate to the **Manage My Compliance** module, locate that **Monitoring/Audit/TA Events** menu, and select **<Add Event>**. The **"Add/Edit Monitoring/Audit/TA Event"** page will load. On the	

"Add/Edit Monitoring/Audit/TA Event" page, data that is required to save Monitoring/Audit/TA events is indicated by an asterisk. See the following steps for completing all fields.

2 Each event needs a unique reference number. Grantees create custom reference numbers and enter them in the reference number field. Next use the radio button to select what type of event you are adding to the System.

***Reference Number:**

***Event Type:** ○**Monitoring** ○**Audit** ○**Technical Assistance** ○**Monitoring/Technical Assistance**

3 Populate the "Organization Reviewed/Assisted" with the **<Select>** link. The organizations reviewed/assisted are chosen from those set up previously in DRGR. The **<Select>** link loads the **"Responsible Organization – Select Organizations"** page. See Chapter 6 – Responsible Organizations for more information on adding and searching for responsible organizations.

Source: Grantee

***Organization Reviewed/Assisted** : Select

***Event Conducted:** ○**On-Site** ○**Remote**

After locating the organization assisted and choosing the radio button in the "Select" column, use the **<Select Responsible Organization>** link to populate the event with the chosen organization and return to the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page.

Results Page 1 of 48 (477 Organizations found)

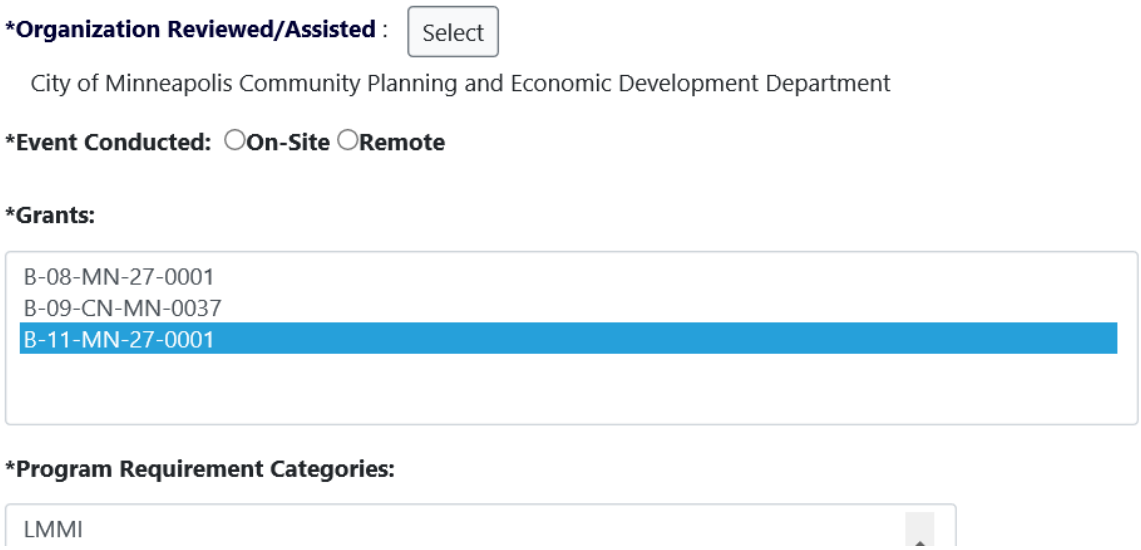
Organization Name	City	State/Territory	DUNS #	Associated Grantee Name	Select
ABERDEEN TOWNSHIP	Aberdeen Twp	NJ			○
Absecon City	Absecon	NJ			○
Allendale Borough	Allendale	NJ			○
Allenhurst Borough	Allenhurst	NJ			○
Allentown	Allentown	NJ			○
Allies, Inc.					○
Alpine Borough	Alpine	NJ			○
Asbury Park City	Asbury Park	NJ			○
Atlantic City	Atlantic City	NJ			○
Atlantic City BOE	Atlantic City	NJ			○

1 2 3 4 5 [Next 10 Results]

Select Responsible Organization | Add Responsible Organization | Cancel

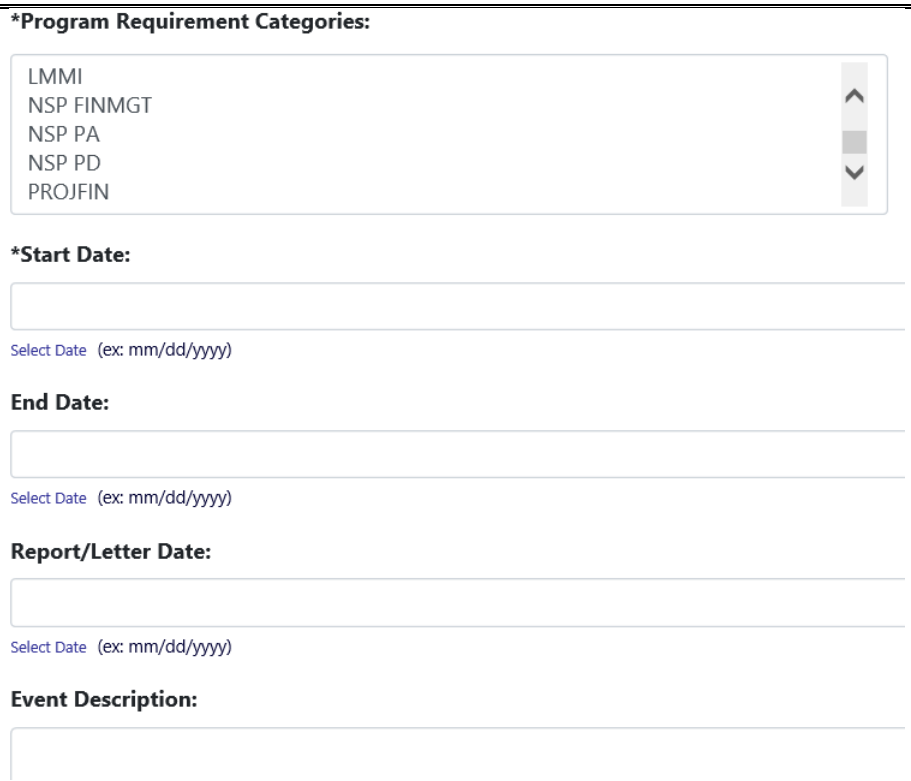
4 Identify whether the assistance/oversight event was "On-site" or "Remote" using the <**Event Conducted>** radio buttons.

Choose the Grants involved from the "Grants" field. Chose a single Grant or hold down the control key to select multiple Grants as applicable to the event. The "Program Requirement Categories" field will then refresh to show only categories relevant to the selected Grant(s).



5 Select one or more major categories of program requirements that were reviewed as part of the event. These categories are specific to the appropriation associated with the chose Grant(s). Use the control key to select multiple events, if desired.

A "Start Date" is required to be entered. For certain events follow up entries may need to be made for "End Date" and "Report/Letter Date."

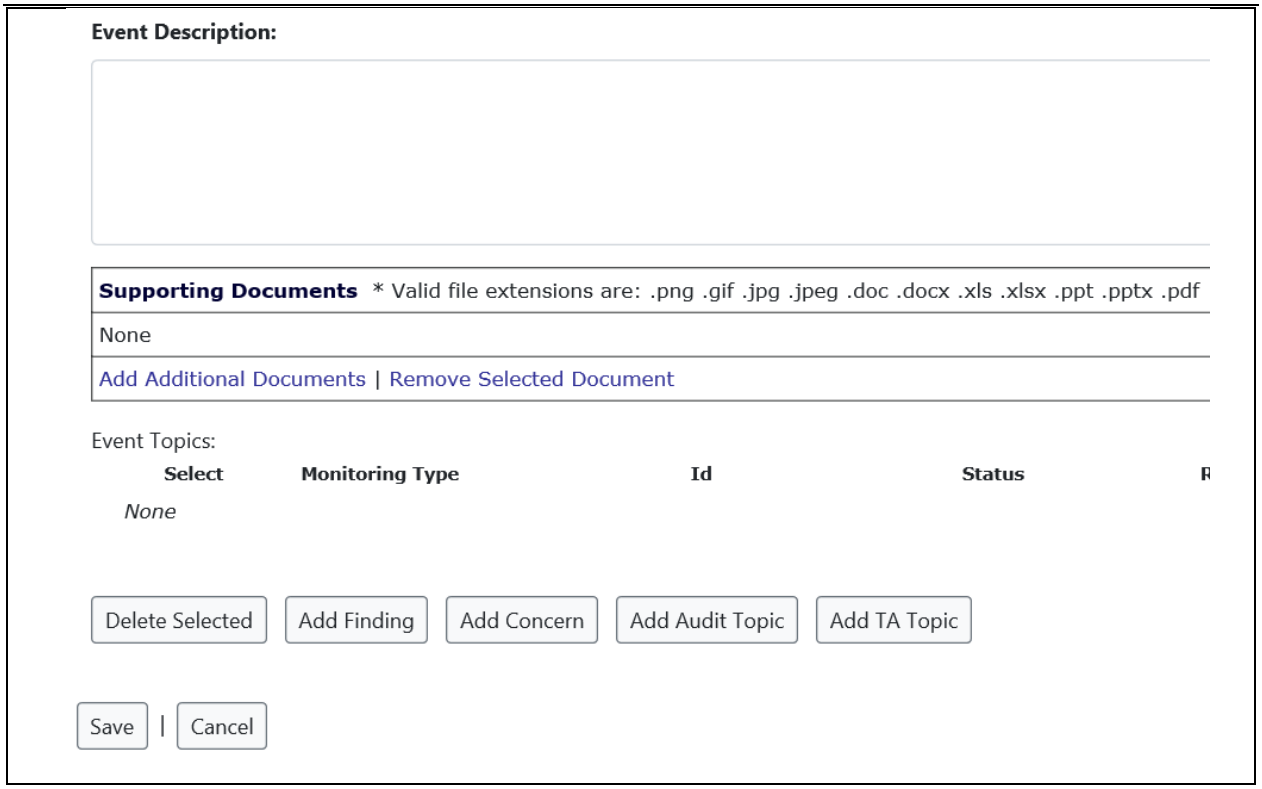


6 The 'Event Description' is an optional, but vital field for providing narrative information about the event and is the place to enter comments or notes regarding the event.

Supporting Documents may be added to the event, if desired/required. This can include reports or information relevant to the event.

Additional elements (Findings/Concerns/Audit Topics/TA Topics) may also be added or removed and will be covered in the upcoming sections B3-B6.

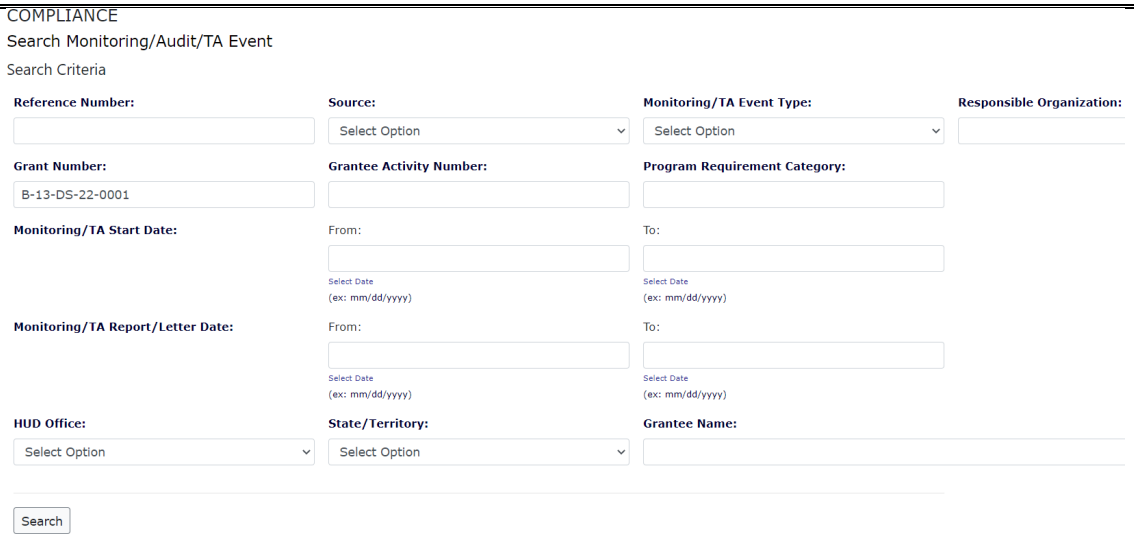
Once ready, save the event by selecting **<Save>**.



B2. Grantee and HUD | Search and View/Edit Monitoring/Audit/TA Events

The **"Search Monitoring/Audit/TA Events"** page provides the User with the ability to search and select Monitoring Events accessible to them. HUD HQ Users have access to all Monitoring Events; HUD Field Office (CPR Representatives) Users have access to all Monitoring events within their territory and Grantees in their jurisdiction.

User Role: Grantee and HUD User	**Action:** Search Events
Purpose: Allow Grantee and HUD Users to search for and view Monitoring/Audit/TA Events and for Grantee Users to edit the events.	
✓ Complete the following steps to search for and view/edit Monitoring/Audit/TA Events:	
1 Navigate to the **Manage My Compliance** module, locate the Monitoring/Audit/TA Events menu, then select **<Search Events>.** The **"Compliance- Search Monitoring/Audit/TA Event"** page will load with the Grant selected in the main Navigation Bar entered into the "Grant Number" field.	



2 Enter information to refine the search, if desired. Conducting a blank search for a specific Grant will return all monitoring, audit, and technical assistance events entered for that Grant. Select **<Search>**.

This action refreshes the page and populates a table below with Monitoring/Audit TA Events with 10 results displayed per page. The table headings are selectable to better sort the results. Choosing them repeatedly will switch between and ascending and descending sort for the selected row. Navigate between pages using the **<page number>** links and **<Next Ten Results>** links at the bottom of the page.

Results Page 1 of 1 (3 Monitoring/Audit/TA Events found)

Source	Reference Number	Event Type	Responsible Organization	Start Date	Report/Letter Date	Action
Grantee	TEST	Monitoring	Atlanta, City of	2020-01-15		View | Edit | Delete
Grantee	TEST - TA	Technical Assistance	Atlanta, City of	2020-01-15		View | Edit | Delete
Grantee	TEST- Audit	Audit	Atlanta, City of	2020-01-15		View | Edit | Delete

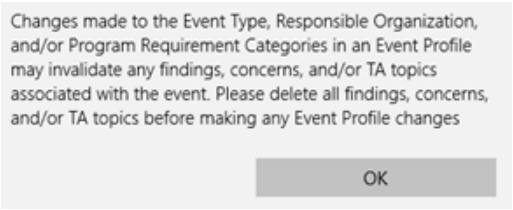
Search

Results Page 1 of 39 (387 Monitoring/Audit/TA Events found)

Source	State/Territory	Grantee Name	Reference Number	Event Type	Responsible Organization	Start Date	Report/Letter Date	Action
Grantee	Louisiana	Louisiana		Technical Assistance		2019-11-13		View
Grantee	Louisiana	Louisiana		Technical Assistance		2019-10-25		View
Grantee	Louisiana	Louisiana		Technical Assistance		2019-10-22		View

Under the "Action" column, Grantee users have links to **<View>, <Edit>,** and **<Delete>** individual events. HUD users have links to **<View>** events. Selecting the **<View>** link loads the **"View Monitoring/Audit/TA Event"** page. Selecting the **<Edit>** link loads the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page. Follow the steps in Section B1 to modify information in the Monitoring/Audit/TA Event.

Changes can be made to the Events after they have been saved, but certain types of changes may cause problems with related findings and concerns that are created. These include event type, responsible organizations, and program requirement categories. A warning message displays if any of these changes are initiated.

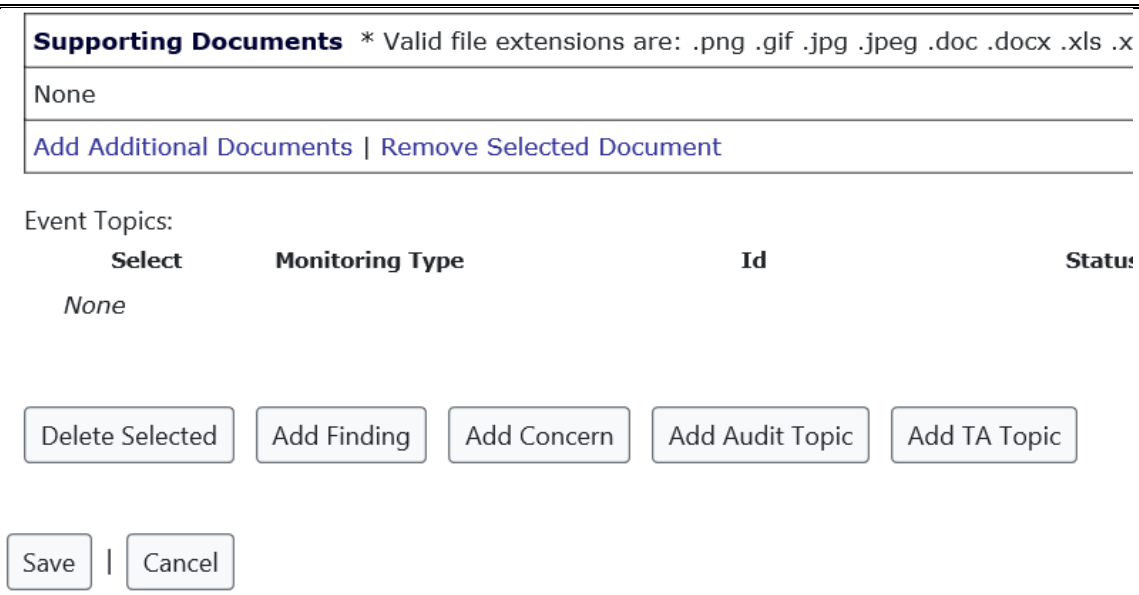


B3. Grantee | Add Findings

Additional Findings, Concerns, and Topics may be added or removed at event creation or later through editing an event. This section reviews adding findings.

TIP! HUD considers a "Finding" to be an instance of noncompliance with program requirements. A "Concern" is a practice or situation that, if left unaddressed, may lead to noncompliance.

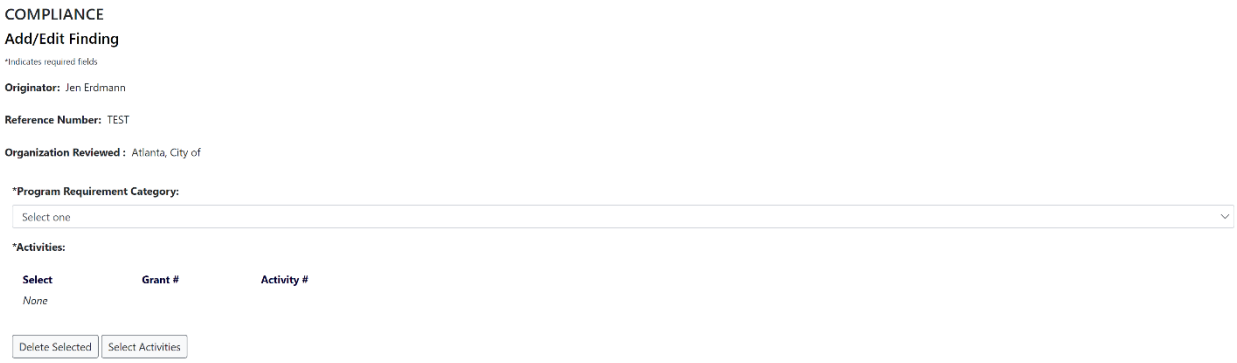
User Role: Grantee User	**Action:** Search Events
Purpose: Allow Grantee Users to add Findings to Monitoring/Audit/TA Events	
✓ Complete the following steps to add findings to Monitoring/Audit/TA Events:	
1 Search for the Monitoring or Monitoring/TA Event to which the finding will be added and select **<Edit>**. See Section B2 above. The **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page will load.	
2 At the bottom of the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page, select **<Add Finding>**. The **"Add/Edit Finding"** page will load.	



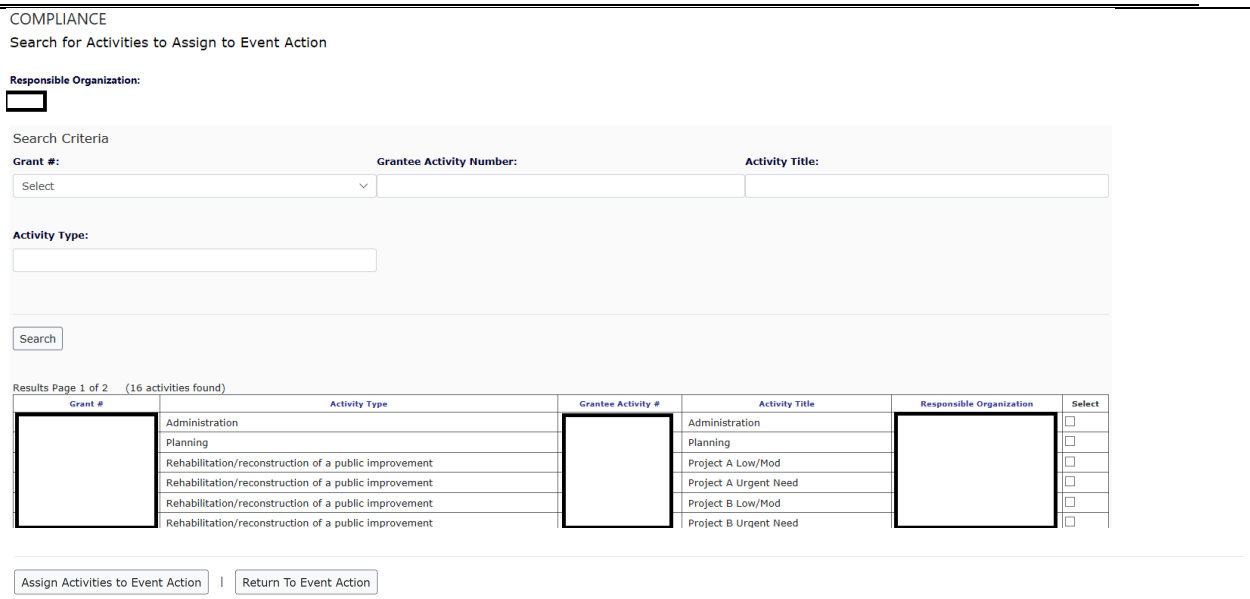
3 Some information from the event is displayed at the top of **"Add/Edit Finding"** page including the event reference number and the responsible organization.

Only the program requirements categories chosen in the monitoring event profile will display in the dropdown for the "Program Requirement Category." Users must select the category that applies to the finding by clicking in the "Select one" box.

The finding may apply to all activities in the Grant or the User can the use the **<Select Activities>** link to identify specific activities. Selecting the **<Select Activities>** link opens the "**Search for Activities to Assign to Event Action"** page.



4 On the "**Search for Activities to Assign to Event Action"** page, conduct a blank search to return all activities or enter search criteria to refine the search. Select **<Search>** to load the results. Choose the activities to assign to the finding in the "Select" column. Select **<Assign Activities to Event Action>**.



5 After adding activities to the finding the **"Add/Edit Finding"** page will reload.

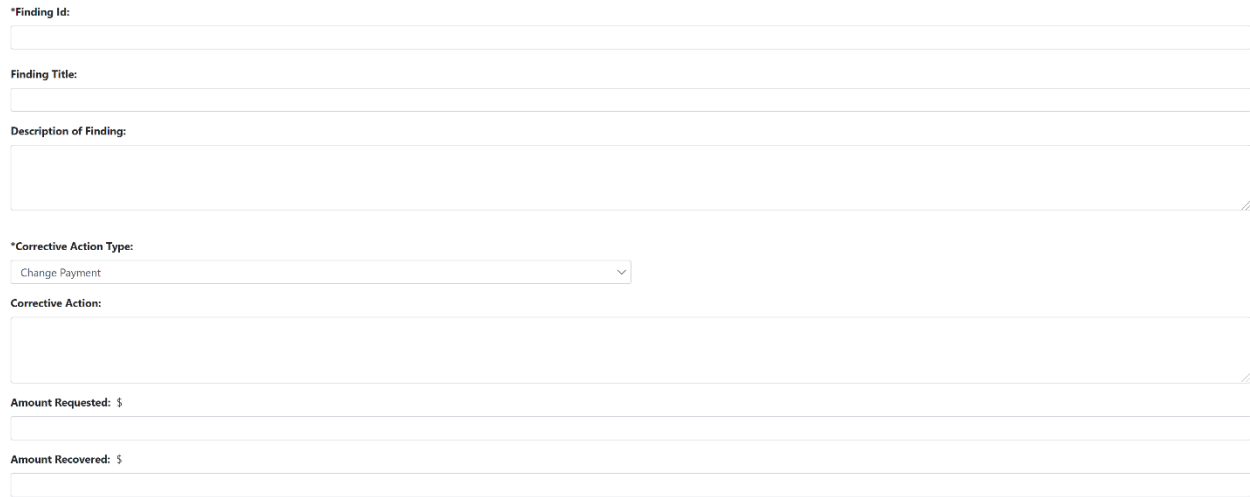
Users must assign an ID to each finding and can create a short title to describe the finding. Enter a description of the finding in the "Description of Finding" field.

TIP! Activities can also be deleted from the selected list of activities on the "Add/Edit Finding" page if needed.

Users select a corrective action using the "Corrective Action Type" dropdown.

Space is provided to describe findings, condition, criteria, cause, effect and corrective actions, but the level of detail is up to the Grantee.

If the corrective action includes reimbursement, there is also space to identify the "Amount Requested" and the "Amount Recovered." These amounts can be left as zero, as needed.



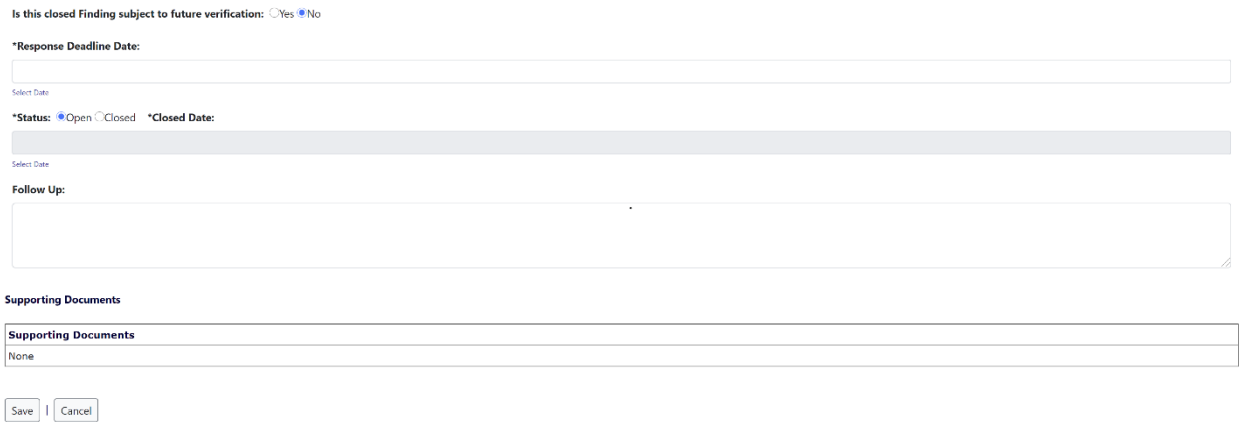
6 Users must enter whether the finding is subject to future verification and enter the "Response Deadline Date."

Users must also indicate the "Status" of the finding. If the finding is shown as closed, a "Closed Date" must be entered.

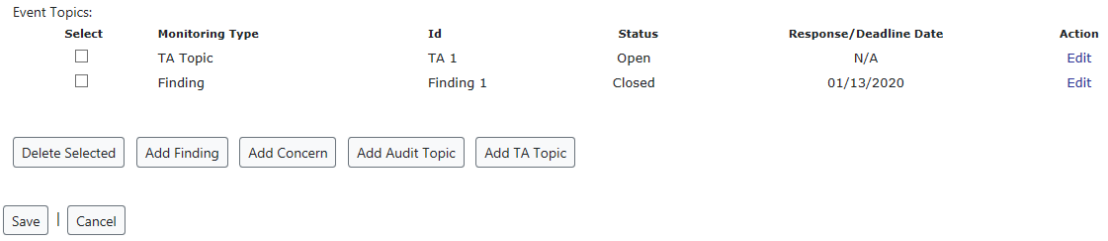
A narrative field is provided to describe follow-up action such as the dates or content of response letters.

Grantees can also view "Supporting Documentation" attached to Monitoring/Audit/TA event before adding finding.

Select **<Save>** after all entries are completed.



7 After the finding is saved, it displays above the **<Add Finding>** link. An **<Edit>** link is displayed under the 'Action' column on the right. This link re-opens the **"Add/Edit Finding"** page for editing of Finding information. Users can also delete existing or add additional findings, concerns, audit topics, and TA topics from this page.



B4. Grantee | Add Concerns

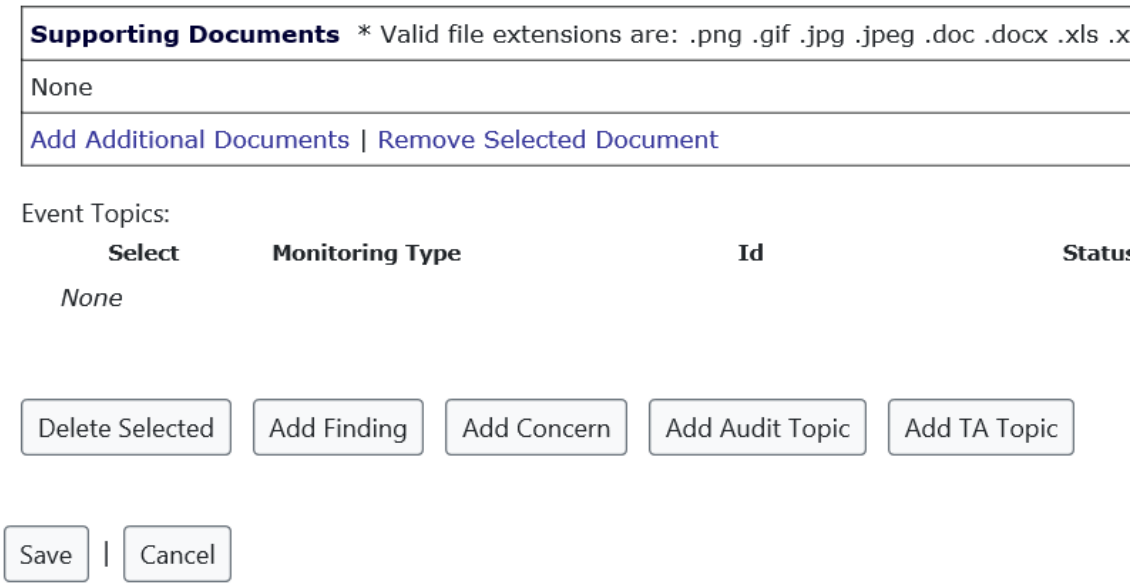
Concerns may be added at event creation or added later through editing an event.

User Role: Grantee User	**Action:** Search Events
Purpose: Allow Grantee Users to add Concerns to Monitoring/Audit/TA Events	
☑ Complete the following steps to add concerns to Monitoring/Audit/TA Events:	

1 Search for the Monitoring or Monitoring/TA Event to which the concern will be added and select **<Edit>**. See Section B2 above.

The **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page will load.

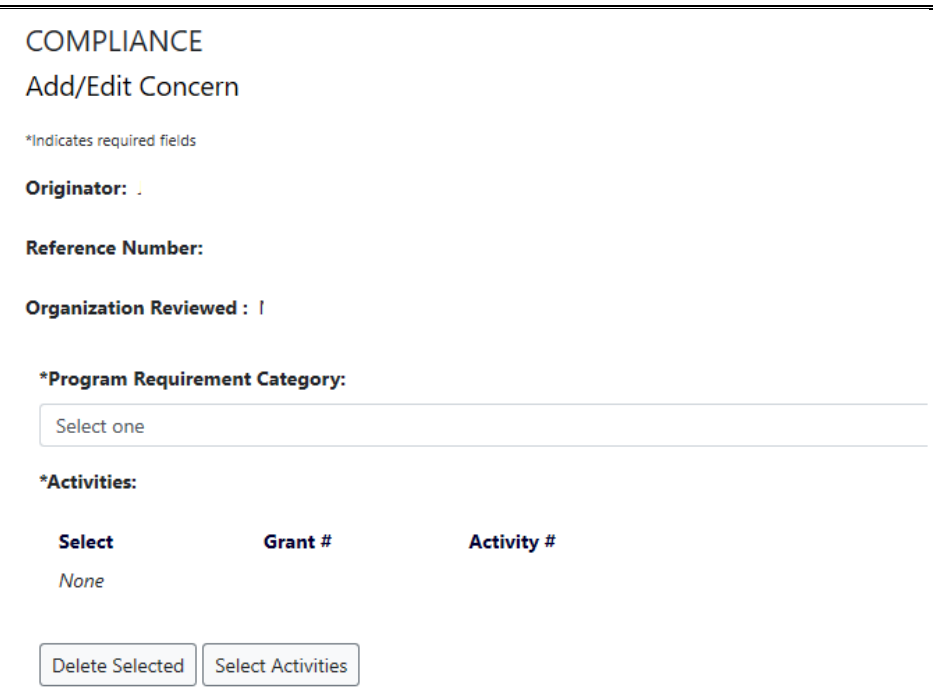
2 At the bottom of the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page, select **<Add Concern>**. The **"Add/Edit Concern"** page will load.



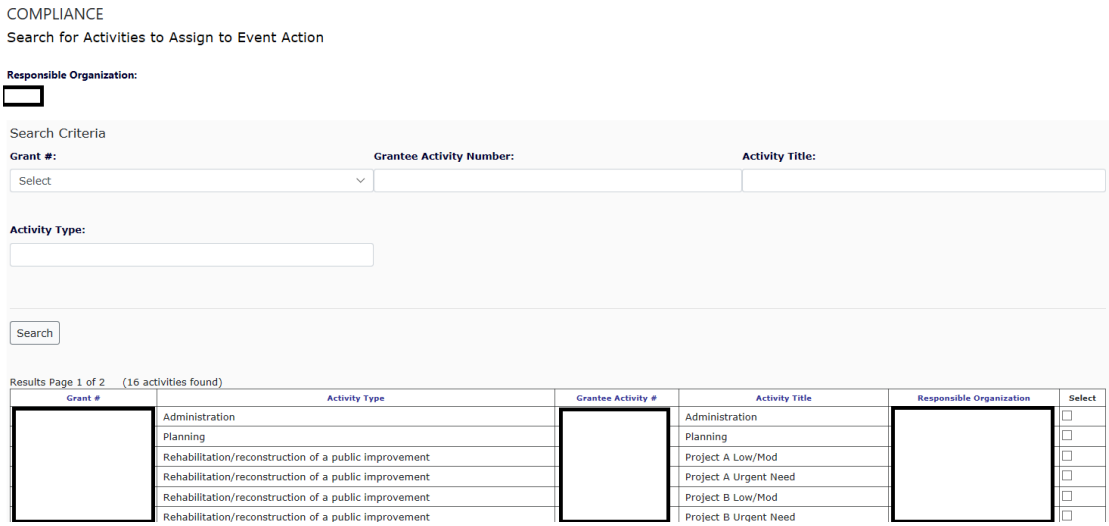
3 Some information from the event is displayed at the top of **"Add/Edit Concern"** page including the event reference number and the responsible organization.

Only the program requirements categories chosen in the monitoring event profile will display in the dropdown for the "Program Requirement Category". Users must select the category that applies to the concern by clicking in the "Select one" box.

The concern may apply to all activities in the Grant or the User can the use the **<Select Activities>** link to identify specific activities. Selecting the **<Select Activities>** link opens the "**Search for Activities to Assign to Event Action"** page.



4 On the "**Search for Activities to Assign to Event Action**" page, conduct a blank search to return all activities or enter search criteria to refine the search. Select **<Search>** to load the results. Choose the activities to assign to the concern in the "Select" column. Select **<Assign Activities to Event Action>**.



5 After adding activities to the concern, the **"Add/Edit Concern"** page will reload.

Users must assign an ID to each concern and can create a short title to describe the concern. Enter a description of the finding in the "Description of Concern" field.

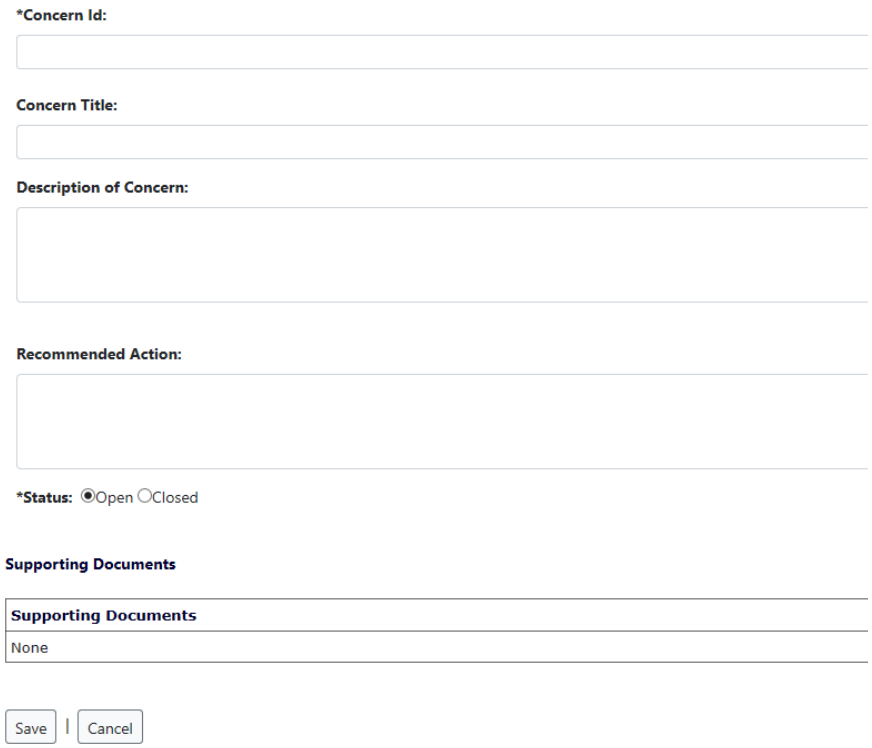
TIP! Activities can also be deleted from the selected list of activities on the "Add/Edit Finding" page if needed.

Users enter a narrative description in the "Recommended Action" box to describe actions the organization should take to address the concern.

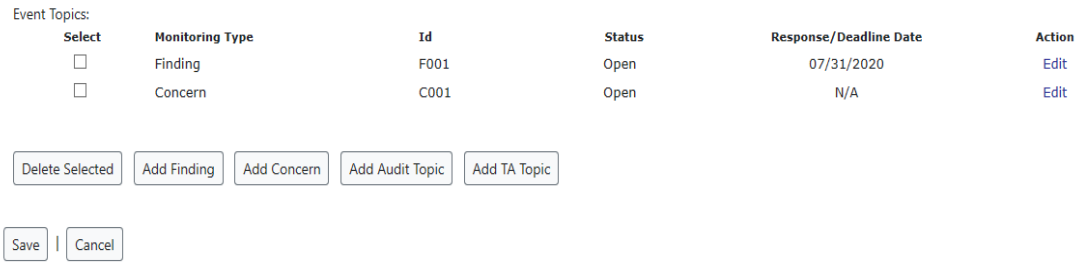
Users must also indicate the "Status" of the concern. If the concern is shown as closed, a "Closed Date" must be entered.

Grantees can also view "Supporting Documentation" attached to Monitoring/Audit/TA event before adding finding.

Select **<Save>** after all entries are completed.



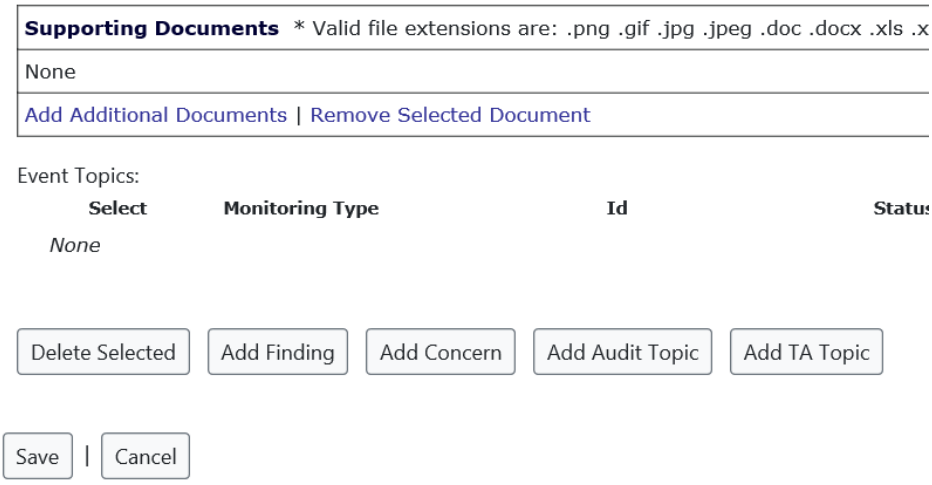
6 After the concern is saved, it displays above the **<Add Concern>** link. An **<Edit>** link is displayed under the "Action" column on the right. This link re-opens the **"Add/Edit Concern"** page for editing of concern information. Users can also delete existing or add additional findings, concerns, audit topics, and TA topics from this page.

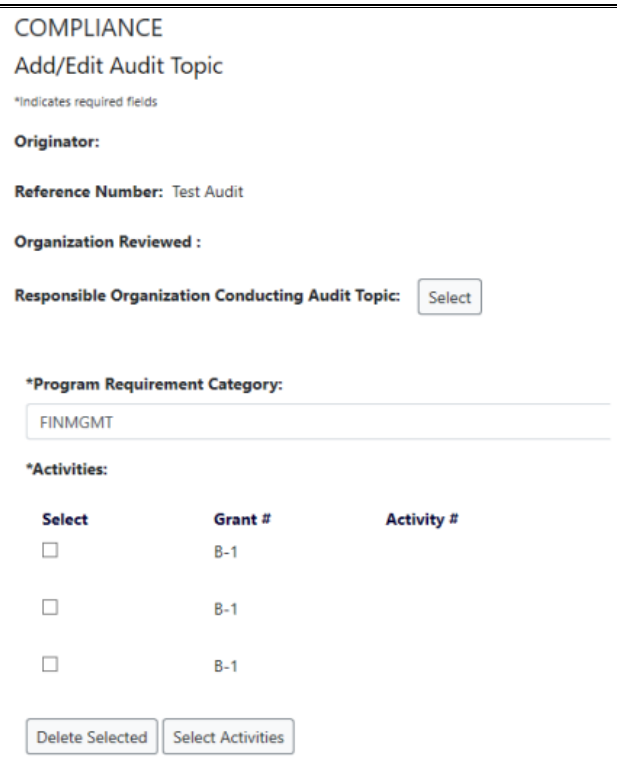


B5. Grantee | Add Audit Topics

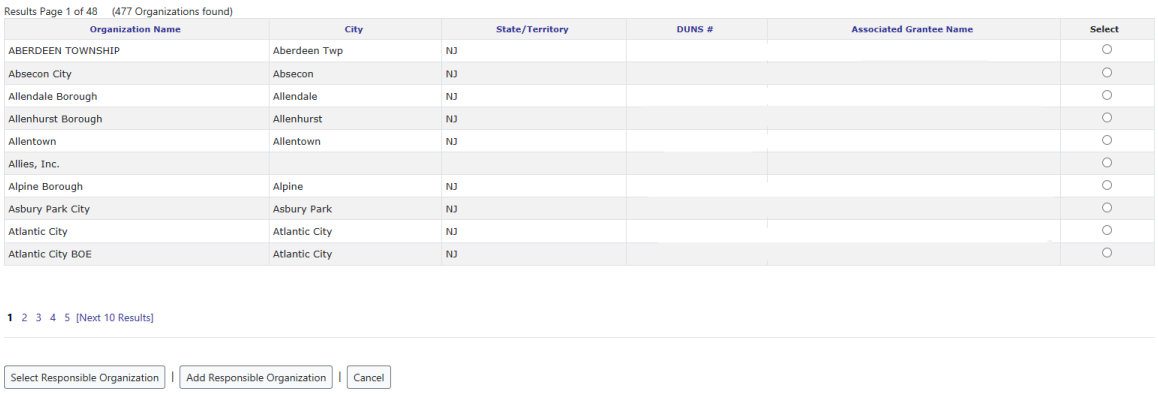
Grantees are responsible for establishing requirements, as necessary, to ensure compliance with Federal audit requirements by Responsible Organizations. Contracts with Responsible Organizations should describe applicable compliance related requirements and the Responsible Organization's compliance responsibility. Methods to ensure compliance for Federal Awards made to Responsible Organizations may include pre-award audits, monitoring during the contract, and post-award audits.

User Role: Grantee User	**Action:** Search Events
Purpose: Allow Grantee Users to add Audit Topics to Monitoring/Audit/TA Events	
✓ Complete the following steps to add audit topics to Monitoring/Audit/TA Events:	
1 Search for the Audit Event to which the audit topic will be added and select **<Edit>**. See Section B2 above. The **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page will load.	
2 At the bottom of the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page, select **<Add Audit Topic>**. The **"Add/Edit Audit Topic"** page will load.	
3 Some information from the event is displayed at the top of **"Add/Edit Audit Topic"** page including the event reference number and the responsible organization. Only the program requirements categories chosen in the audit event profile will display in the dropdown for the "Program Requirement Category." Users must select the category that applies to the audit topic by clicking in the "Select one" box. The audit topic may apply to all activities in the Grant or the User can the use the **<Select Activities>** link to identify specific activities. Selecting the **<Select Activities>** link opens the "**Search for Activities to Assign to Event Action"** page.	





4 On the "**Search for Activities to Assign to Event Action"** page, conduct a blank search to return all activities or enter search criteria to refine the search. Select **<Search>** to load the results. Choose the activities to assign to the audit topic in the "Select" column. Select **<Assign Activities to Event Action>**.



5 After adding activities to the audit topic the **"Add/Edit Audit Topic"** page will reload.

Users must assign an ID to each audit topic and can create a short title to describe the audit topic. Enter a description of the audit topic in the "Description of Audit Topic" field.

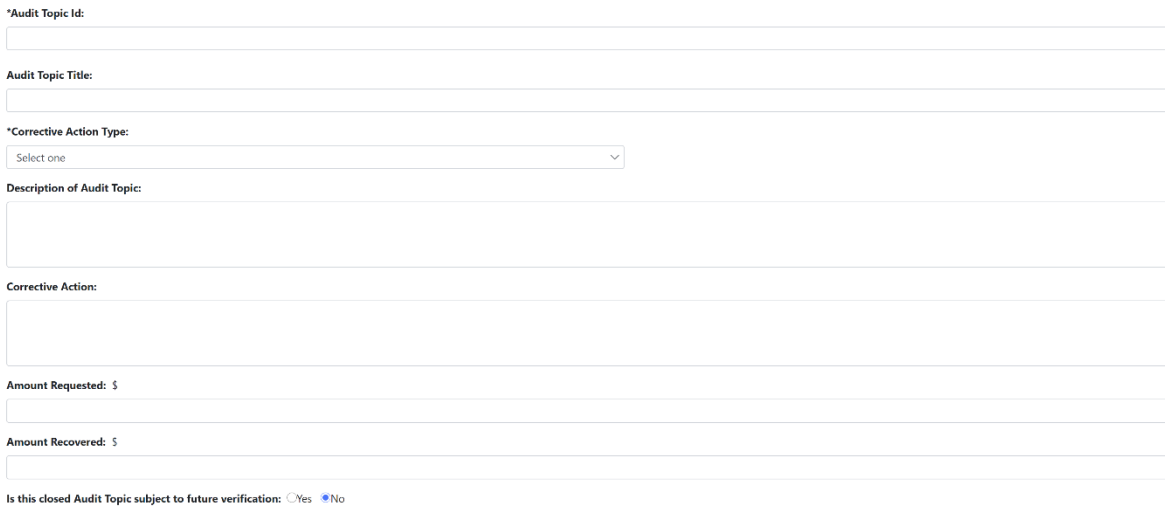
Users select a corrective action using the "Corrective Action Type" dropdown.

TIP! Activities can also be deleted from the selected list of activities on the "Add/Edit Finding" page if needed.

Space is provided to describe the condition, criteria, cause, effect and corrective actions, but the level of detail is up to the Grantee.

If the corrective action includes reimbursement, there is also space to identify the "Amount Requested" and the "Amount Recovered." These amounts can be left as zero, as needed.

Users must enter whether the finding is subject to future verification by selecting "Yes" or "No."



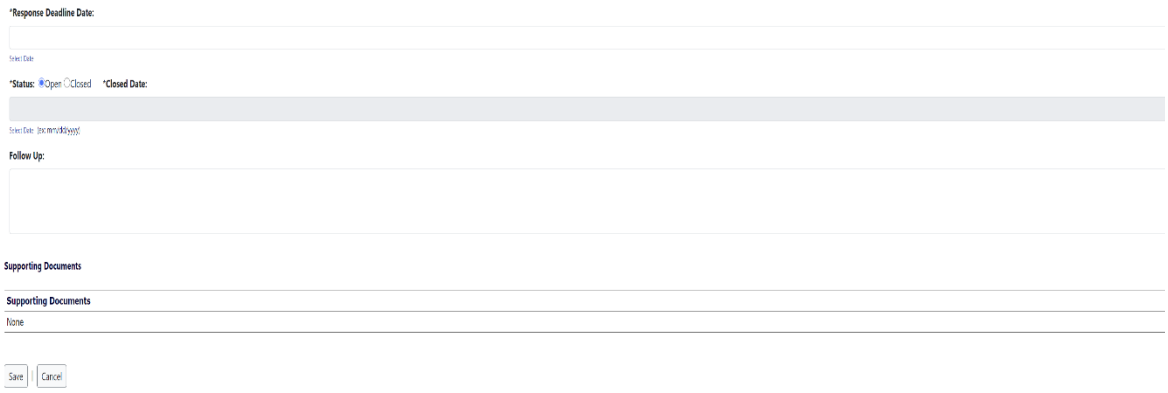
6 Users must enter the "Response Deadline Date."

Users must also indicate the "Status" of the finding. If the finding is shown as closed, a "Closed Date" must be entered.

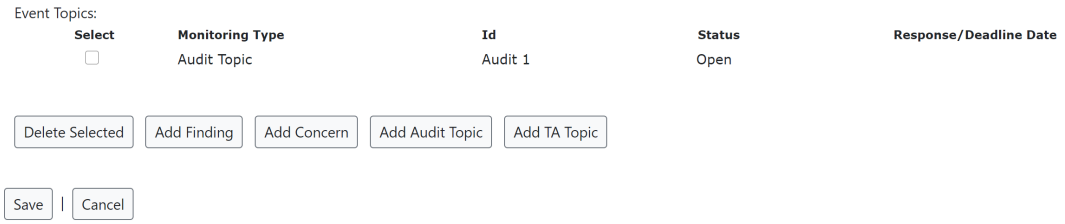
A narrative field is provided to describe follow-up action such as the dates or content of response letters.

Grantees can also view "Supporting Documentation" attached to Monitoring/Audit/TA event before adding finding.

Select **<Save>** after all entries are completed.



7 After the audit topic is saved, it displays above the **<Add Audit Topic>** link. An **<Edit>** link is displayed under the "Action" column on the right. This link re-opens the **"Add/Edit Audit Topic"** page for editing of concern information. Users can also delete existing or add additional findings, concerns, audit topics, and TA topics from this page.



B6. Grantee | Add TA Topics

Throughout the year, the Grantees continue the process of providing support to help Responsible Organizations achieve their goals. This is accomplished by providing Technical Assistance (TA) to address identified problems, evaluate performance, and ensure compliance with regulations and program requirements.

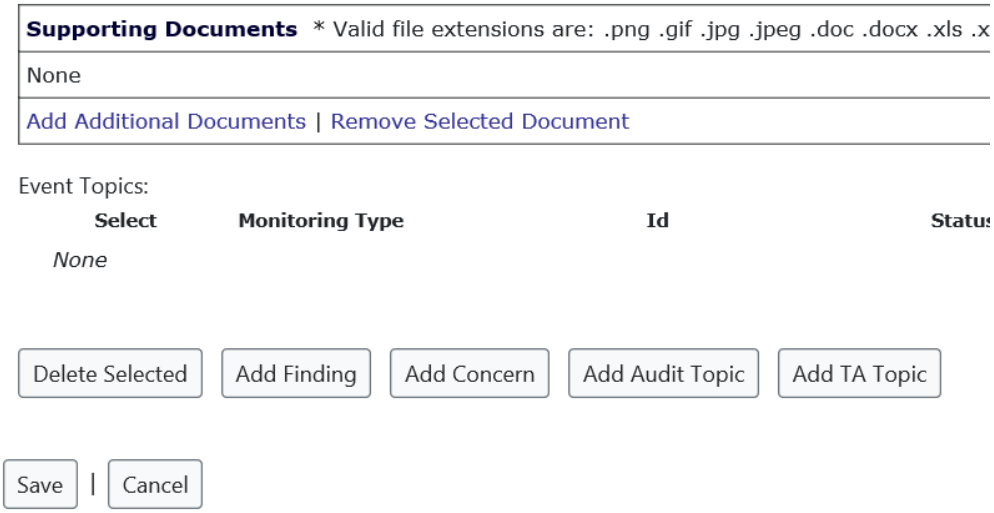
User Role: Grantee User	**Action:** Search Events
Purpose: Allow Grantee Users to add TA Topics to Monitoring/Audit/TA Events	

Complete the following steps to add TA topics to Monitoring/Audit/TA Events:

1 Search for the Monitoring/TA or Technical Assistance Event to which the audit topic will be added and select **<Edit>**. See Section B2 above.

The **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page will load.

2 At the bottom of the **"Compliance- Add/Edit Monitoring/Audit/TA Event"** page, select **<Add TA Topic>**. The **"Add/Edit TA Topic"** page will load.

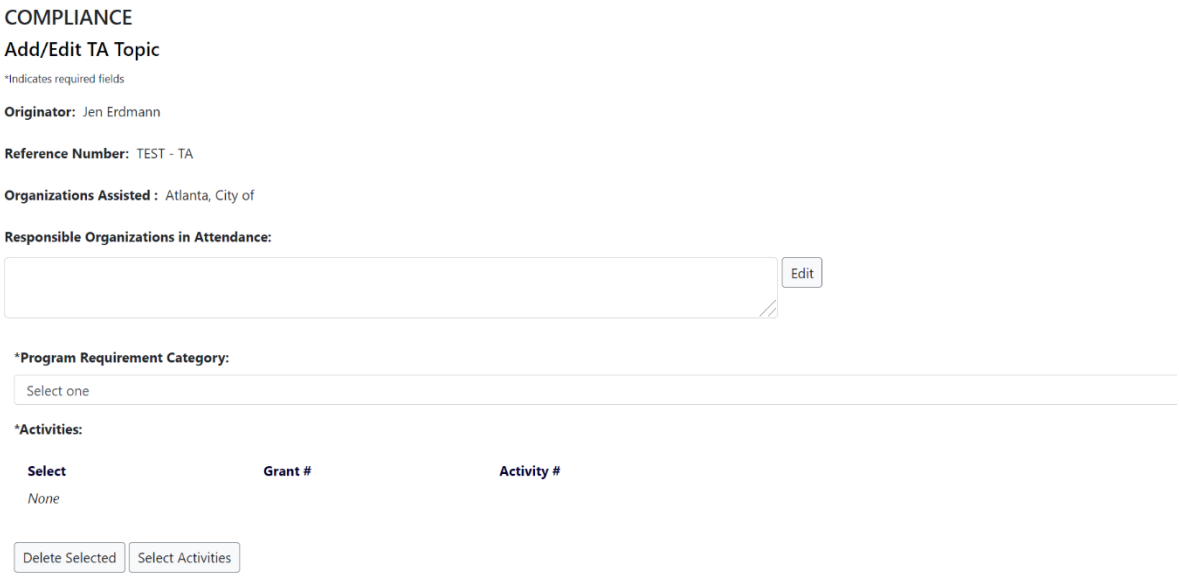


3 Some information from the event is displayed at the top of **"Add/Edit Audit Topic"** page including the event reference number and the responsible organization.

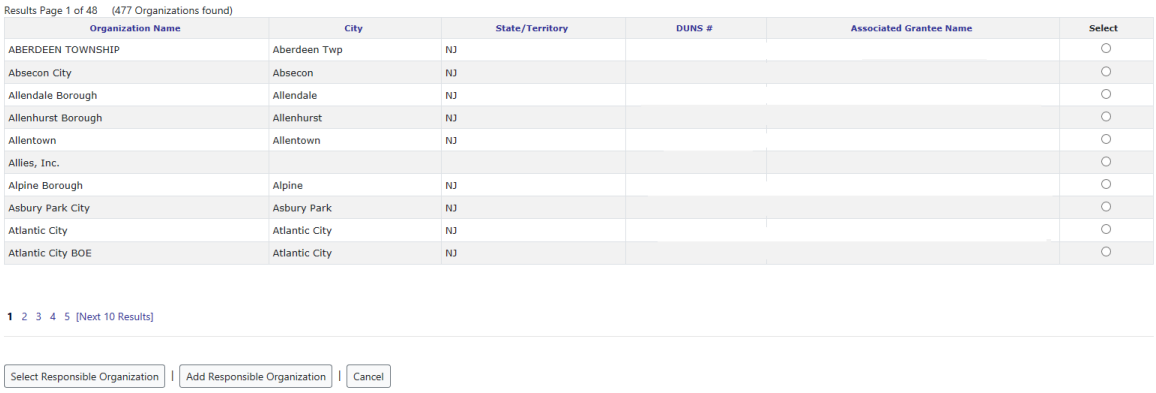
Using the **<Edit>** link, select the Responsible Organizations in attendance.

Only the program requirements categories chosen in the event profile will display in the dropdown for the "Program Requirement Category." Users must select the category that applies to the TA topic by clicking in the "Select one" box.

The TA topic may apply to all activities in the Grant or the User can the use the **<Select Activities>** link to identify specific activities. Selecting the **<Select Activities>** link opens the "**Search for Activities to Assign to Event Action"** page.



4 On the "**Search for Activities to Assign to Event Action"** page, conduct a blank search to return all activities or enter search criteria to refine the search. Select **<Search>** to load the results. Choose the activities to assign to the TA topic in the "Select" column. Select **<Assign Activities to Event Action>**.



Organization Name	City	State/Territory	DUNS #	Associated Grantee Name	Select
ABERDEEN TOWNSHIP	Aberdeen Twp	NJ			
Absecon City	Absecon	NJ			
Allendale Borough	Allendale	NJ			
Allenhurst Borough	Allenhurst	NJ			
Allentown	Allentown	NJ			
Allies, Inc.					
Alpine Borough	Alpine	NJ			
Asbury Park City	Asbury Park	NJ			
Atlantic City	Atlantic City	NJ			
Atlantic City BOE	Atlantic City	NJ			

5 After adding activities to the finding the **"Add/Edit TA Topic"** page will reload.

Users must assign an ID to each TA Topic and can create a short title to describe the TA topic.

TIP! Activities can also be deleted from the selected list of activities on the "Add/Edit Finding" page if needed. (

Choose a rationale of "Concern," "Finding," or "Preventative" from the "Rationale" dropdown field. (

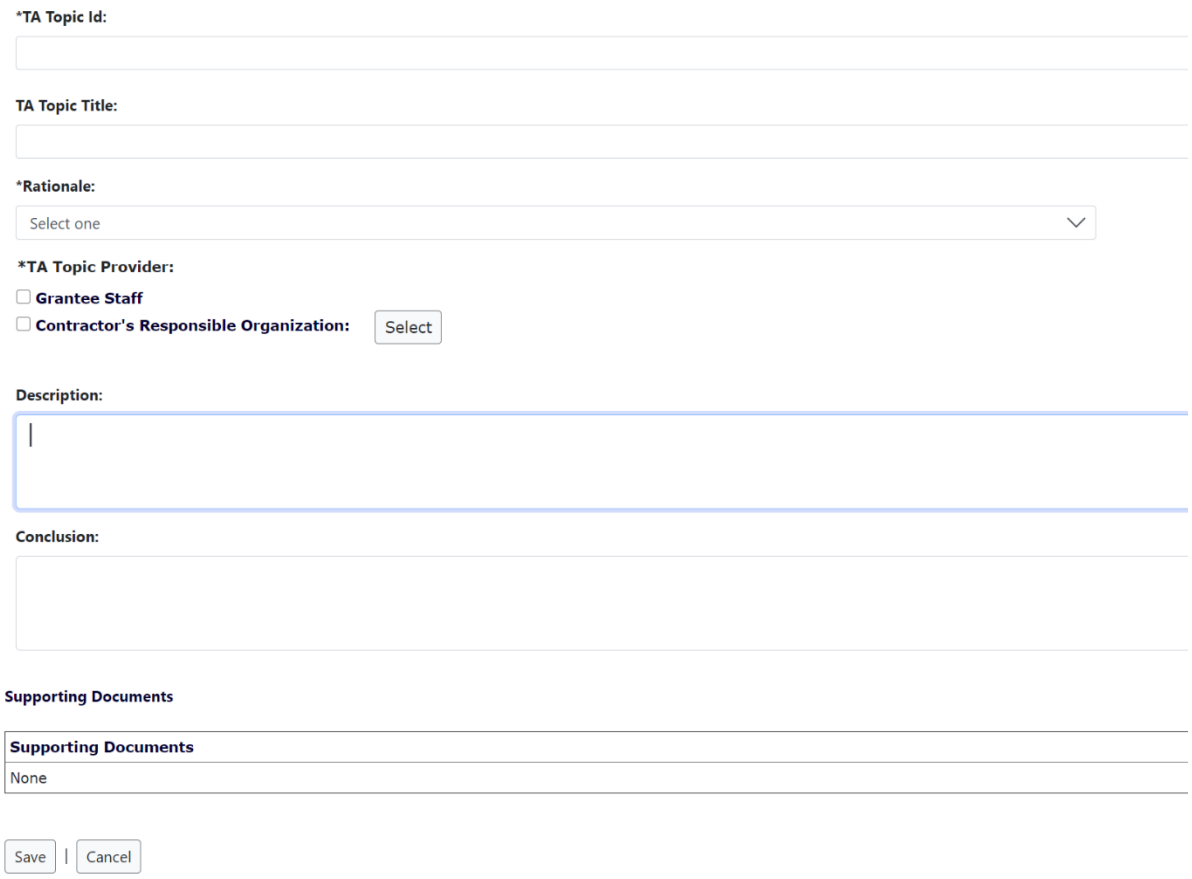
Select the "TA Topic Provider" using the "Grantee" or "Contractor's Responsible Organization" check boxes. Use the **<Select>** link to search for responsible organizations.

Space is provided to describe the technical assistance and to make a conclusion, but the level of detail is up to the Grantee.

Grantees can also view "Supporting Documentation" attached to Monitoring/Audit/TA event before adding finding.

Select **<Save>** after all entries are completed.

The remainder of this page intentionally left blank.



6 After the TA topic is saved, it displays above the **<Add TA Topic>** link. An **<Edit>** link is displayed under the "Action" column on the right. This link re-opens the **"Add/Edit TA Topic"** page for editing of

concern information. Users can also delete existing or add additional findings, concerns, audit topics, and TA topics from this page.

B7. Grantee and HUD | Search Event Topics

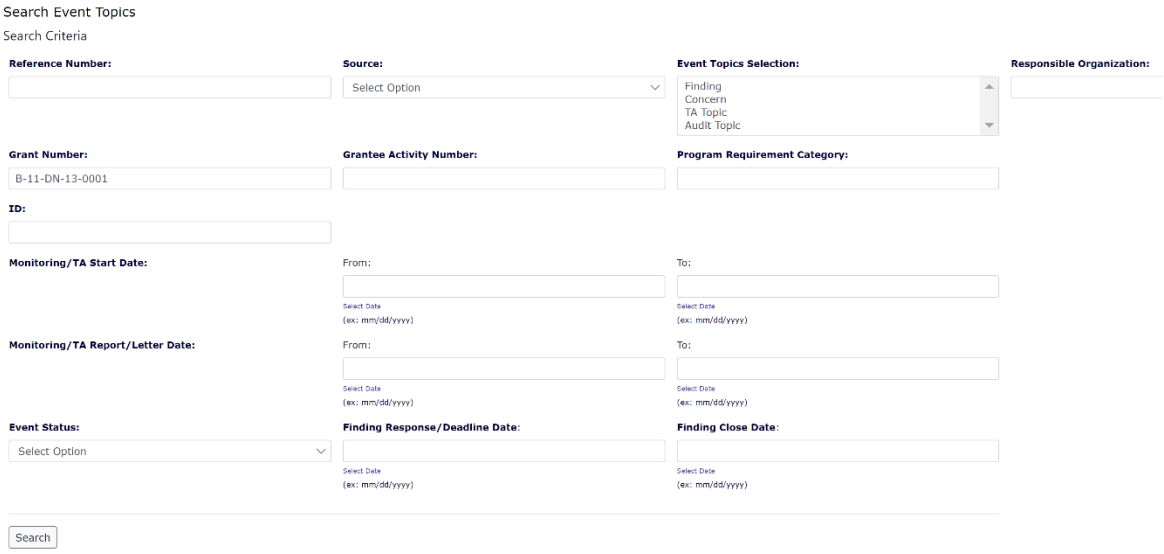
The **"Search Event Topics"** page provides the User with the ability to search and select findings and concerns accessible to them. HUD HQ Users have access to all findings/concerns; HUD Field Office Users have access to all findings/concerns within their territory and Grantees in their jurisdiction.

User Role: Grantee and HUD User	**Action:** Search Event Topics
Purpose: Allow Grantee and HUD Users to search for and view Monitoring/Audit/TA Event Topics and for Grantee Users to edit the event topics.	

Complete the following steps to search for and view/edit Monitoring/Audit/TA Events:

1 Navigate to the **Manage My Compliance** module, locate the Monitoring/Audit/TA Events menu, then select <Search Event Topics>. The **"Compliance- Search Monitoring/Audit/TA Event"** page will load with the Grant selected in the main Navigation Bar entered into the "Grant Number" field.

2 Enter information to refine the search, if desired. Conducting a blank search for a specific Grant will return all monitoring, audit, and technical assistance events entered for that Grant. Select **<Search>**.



This action refreshes the page and populates a table below with Monitoring/Audit TA Events with 10 results displayed per page. The table headings are selectable to better sort the results.

Choosing them repeatedly will switch between and ascending and descending sort for the selected row. Navigate between pages using the **<page number>** links and **<Next Ten Results>** links at the bottom of the page.

Results Page 1 of 1 (2 Monitoring/Audit/TA Events found)

Source	Reference Number	Responsible Organization	Event Type	ID	Status	Start Date	Report/Letter Date	Action
Grantee	TEST- Audit	Atlanta, City of	Audit Topic	Audit 1	Open	2020-01-15		View | Edit | Delete
Grantee	TEST - TA	Atlanta, City of	TA Topic	TEST TA	Open	2020-01-15		View | Edit | Delete

Search

Results Page 1 of 39 (387 Monitoring/Audit/TA Events found)

Source	State/Territory	Grantee Name	Reference Number	Event Type	Responsible Organization	Start Date	Report/Letter Date	Action
Grantee	Louisiana	Louisiana		Technical Assistance		2019-11-13		View
Grantee	Louisiana	Louisiana		Technical Assistance		2019-10-25		View
Grantee	Louisiana	Louisiana		Technical Assistance		2019-10-22		View

Under the "Action" column, Grantee users have links to **<View>, <Edit>** and **<Delete>** individual events. HUD users have links to **<View>** events. Selecting the **<View>** link loads the **"View Monitoring/Audit/TA Event"** page. Selecting the **<Edit>** link loads the **"Add/Edit Topic"** page. Follow the steps in Section B3-B6 to modify information in the Event Topics.

Changes can be made to the Events and Event Topics after they have been saved, but certain types of changes may cause problems with related findings and concerns that are created. These include event type, responsible organizations, and program requirement categories. A warning message displays if any of these changes are initiated.

Changes made to the Event Type, Responsible Organization, and/or Program Requirement Categories in an Event Profile may invalidate any findings, concerns, and/or TA topics associated with the event. Please delete all findings, concerns, and/or TA topics before making any Event Profile changes

OK

The remainder of this page is intentionally left blank.

Chapter 34: Data Uploads

Chapter 34: Data Uploads 1

A. Data Uploads Overview 2

A1. Steps to Complete Data Uploads 2

A2. Data Upload Templates 2

A3. Data Upload Types 2

B. Manage My Grants Module Uploads 3

B1. Grantee| Upload Action Plan and Activities 3

B2. Grantee| Upload Project 4

B3. Grantee and HUD Users| Upload TA Work Plan 5

B4. Grantee| Upload Performance Reports 6

C. Manage My Financials Module Uploads 7

C1. Grantee| Upload Obligations 7

C2. Grantee| Upload Vouchers 8

D. Administration Module Uploads 9

D1. Grantee and HUD | Upload User Requests 9

D2. Grantee | Upload Responsible Organizations 10

D3. Grantee and HUD | Upload Staff Data 11

D4. Grantee and HUD | Batch Uploads 11

E. Completing Data Uploads 13

E1. Grantee and HUD | Select Upload Template and File 13

E2. Grantee and HUD | Verify Results of Data Upload 14

Chapter 34: Data Uploads

This Chapter provides procedures for uploading data directly into DRGR using spreadsheets instead of entering the data manually across DRGR pages.

DRGR uploads can be accessed in three DRGR Modules:

- **Administration Module** – Access upload links from the dropdown menus
- **Manage My Grants Module** – Access uploads from Manage Action Plan and Manage Performance Report
- **Manage My Financials Module**- Access uploads from Search/Edit Obligations and Vouchers

TIP! HUD provides templates that must be used for data uploads. See the HUD Exchange for a list of current templates. All templates must be saved in the .CSV file format. See Section B2 for more tips.

This Chapter describes actions for Grantee Users and HUD Users, and is divided into subsections:

Grantee Users

Menu Option	Subsection	Action
Manage Action Plan	B1 – B3	Upload Action Plan, Projects and Activities, and TA Work Plans
Manage Performance Report	B4	Upload Performance Report accomplishments
Search/Edit Obligation	C1	Upload Obligations
Create a Voucher	C2	Upload New Vouchers
Upload User Requests	D1	Upload New and Edit Users
Upload Responsible Organizations	D2	Upload New and Edit Responsible Organizations
Upload	D4	Upload Batch Data

HUD Users

Menu Option	Section	Action
Manage Action Plan	B3	Upload TA Work Plans
Upload User Requests	D1	Upload New and Edit Users
Upload Staff Data	D3	Upload and Edit Staff Data
Upload	D4	Upload Batch Data

A. Data Uploads Overview

Data Uploads offer DRGR Users the option of uploading data into DRGR in-lieu of entering the information into DRGR manually across multiple pages. For example, if a Grantee needed to create a voucher for several line items, or upload quarterly accomplishments across several activities, data upload templates can be used to upload the data directly into DRGR.

TIP! Refer to Report A42 to view existing Grantee User access to Grants.

The upload feature is meant to save Grantees time by allowing them to enter larger volumes of data into a template and avoid having to navigate through multiple DRGR pages. If used properly, data upload templates can also be a great tool for Grantees to collect information that must be input into DRGR from their subgrantees and subrecipients. DRGR Users should use this Section of the User Manual with the supplemental DRGR Factsheet: Data Uploads, which available under the Factsheet link online at https://www.hudexchange.info/drgr.

A1. Steps to Complete Data Uploads

The following steps describe the process for uploading data into DRGR. Each step is explained in more detail throughout this Chapter of the DRGR User Manual:

- **Section A2:** Download and enter all necessary data into the Upload Template(s) using local records and DRGR reports.
- **Section B-D:** Login to DRGR and navigate to the appropriate upload function.
- **Section E1:** Upload the data using the completed Upload Template.
- **Section E2:** Verify results of data upload.

A2. Data Upload Templates

DRGR Grantee users authorized to complete DRGR data uploads must use pre-designed Upload Templates found at https://www.hudexchange.info/resource/3703/drgr-data-upload-templates/. Users with advanced knowledge of .CSV file formats may create their own upload templates, so long as the created templates are identical to the pre-designed templates. The following criteria MUST be met in order for the DRGR System to successfully process data uploads:

- Files uploaded into DRGR must be .CSV formatted. To ensure the file is CSV formatted prior to upload into the DRGR System, save the file as '.csv – comma delimited' file.
- Upload Templates are case-sensitive and should not contain any formatting (e.g., $ dollar signs, semi-colons, or other special characters).
- Users cannot alter the column order of the Upload Templates.
- The data entered into the Upload Templates must match the values that appear in the DRGR System (e.g., Activity Status = Underway; National Objective: Low/Mod). These fields typically corresponds to the dropdown menus or radio buttons users see on their screen in DRGR.
- The data entered into the Upload Templates must also match the data already entered into the DRGR System by the Grantee, if applicable (e.g. when editing an activity, the existing Activity # already entered into DRGR must match the Activity # entered into the data Upload Template).

A3. Data Upload Types

DRGR supports the following data uploads:

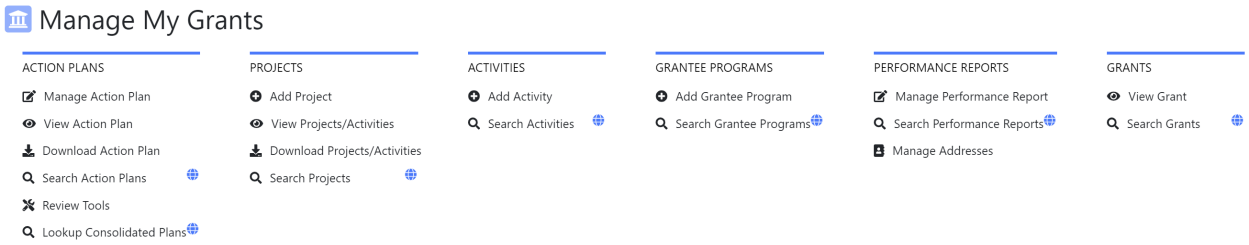
- Regular Uploads – individual Upload Templates for each Upload Type (e.g., Action Plan Project, Voucher, etc.)
- Batch Data Uploads – multiple Upload Types in a single Upload Template

A list of Data Upload Types for all users can be found in the "DRGR Data Upload Types and Associated Columns Quick Guide" on the HUD Exchange.

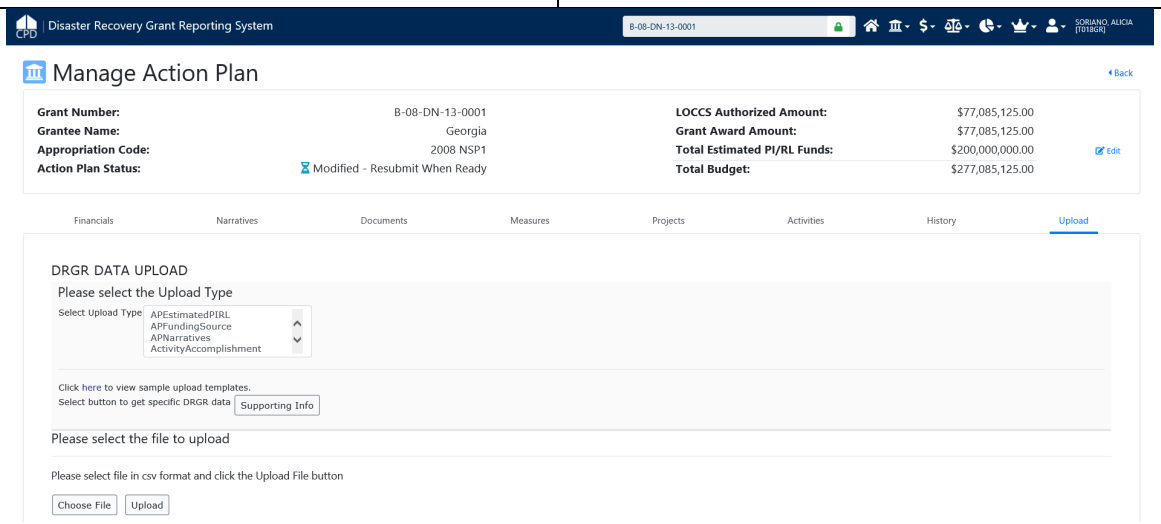
B. Manage My Grants Module Uploads

The following steps describe how to access the appropriate DRGR pages based on the Upload Template that is ready to be uploaded into the DRGR System.

B1. Grantee| Upload Action Plan and Activities

User Role: Grantee User	**Menu Option:** Manage Action Plan
Purpose: Allow Grantee Users to access Action Plan and Activity Uploads.	
Complete the following steps to access Action Plan and Activity Uploads:	
1 Navigate to the **Manage My Grants** module, locate the **Action Plans** menu, and select **<Manage Action Plan>**. The **"Manage Action Plan"** page will load. 	
2 On the **"Manage Action Plan"** page, select the "Upload" tab.	

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



3 Proceed to Section E Completing Data Uploads to complete the process.

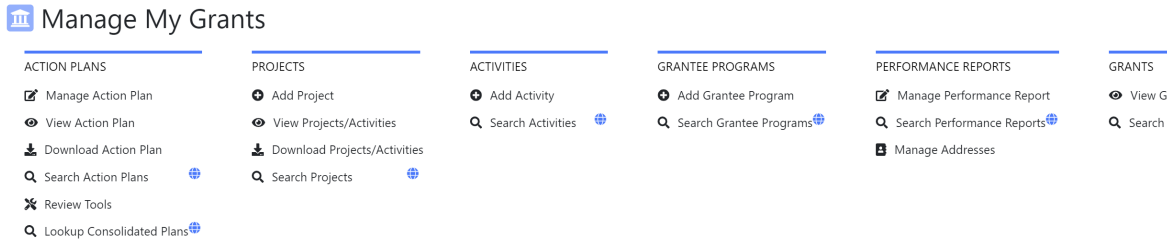
B2. Grantee| Upload Project

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

Purpose: Allow Grantee Users to access Project Uploads.

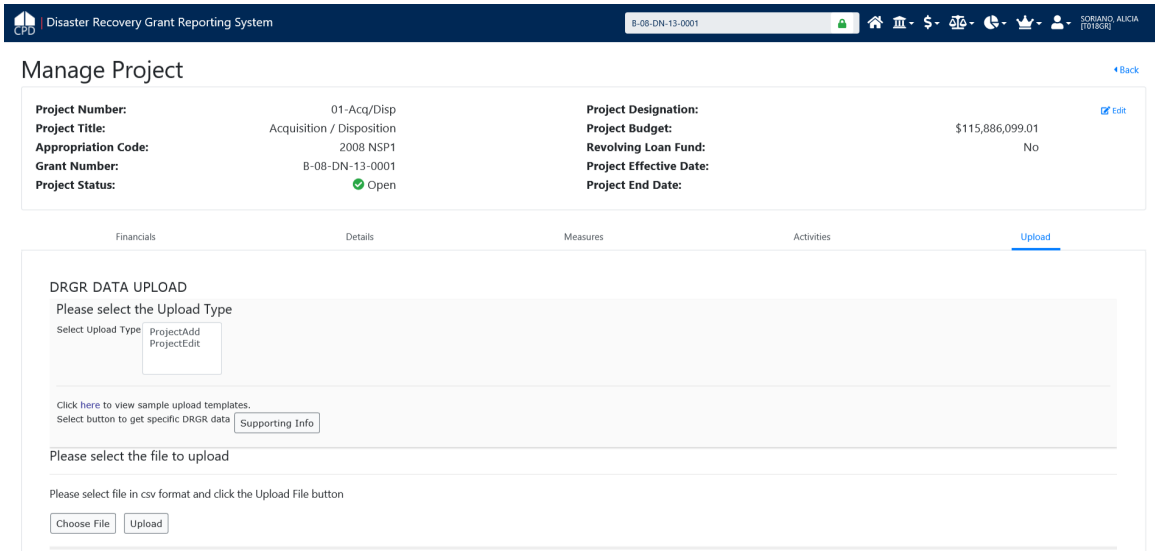
Complete the following steps to access Project Uploads:

1 Navigate to the **Manage My Grants** module, locate the **Action Plans** menu, and select **<Search Project>**. The **"Search Projects"** page will load. Select any project to edit. The **"Manage Project"** page will load.



2 On the **"Manage Project"** page, select the "Upload" tab.

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



3 Proceed to Section E Completing Data Uploads to complete the process.

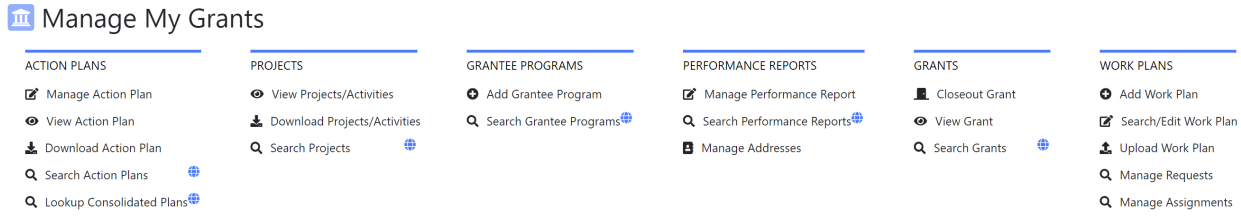
B3. Grantee and HUD Users| Upload TA Work Plan

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

Purpose: Allow Grantee and HUD Users to access TA Work Plan Uploads.

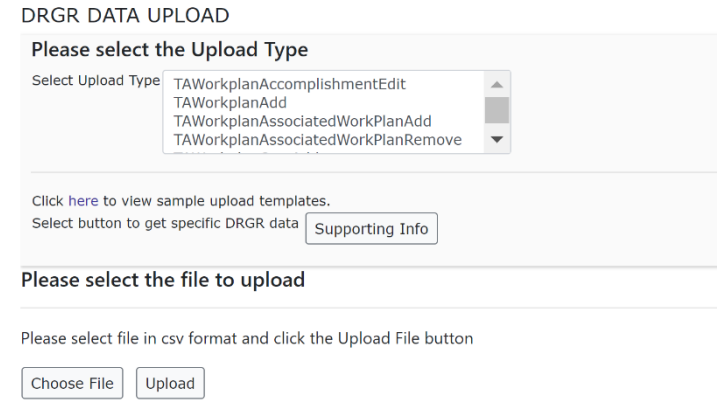
Complete the following steps to access TA Work Plan Uploads:

1 Navigate to the **Manage My Grants** module , locate the **Work Plans** menu, and select **<Upload TA Work Plan>**. The **"DRGR Data Upload"** page will load.



2 Once the **"DRGR Data Upload"** page loads, proceed to Section E Completing Data Uploads to complete the process.

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



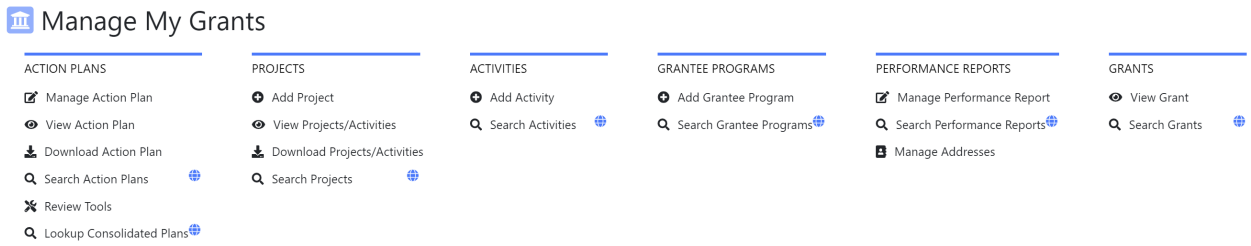
B4. Grantee| Upload Performance Reports

User Role: Grantee User	**Menu Option:** Manage Performance Report

Purpose: Allow Grantee Users to access Performance Report Uploads.

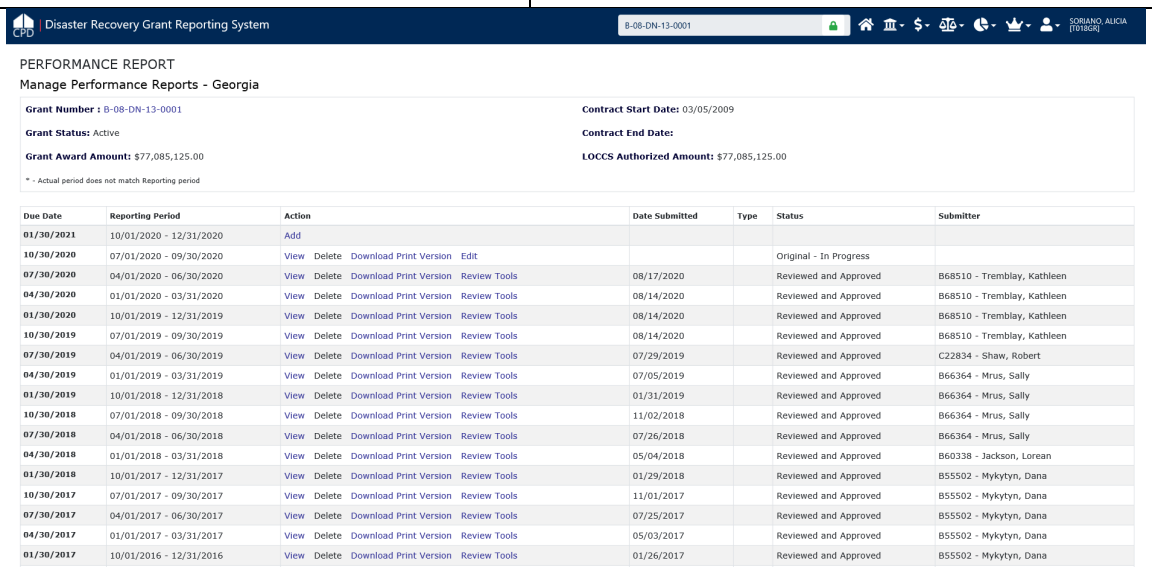
Complete the following steps to access Performance Report Uploads:

1 Navigate to the **Manage My Grants** module, locate the **Performance Report** menu, and select **<Manage Performance Report>**. The **"Performance Report"** page will load.



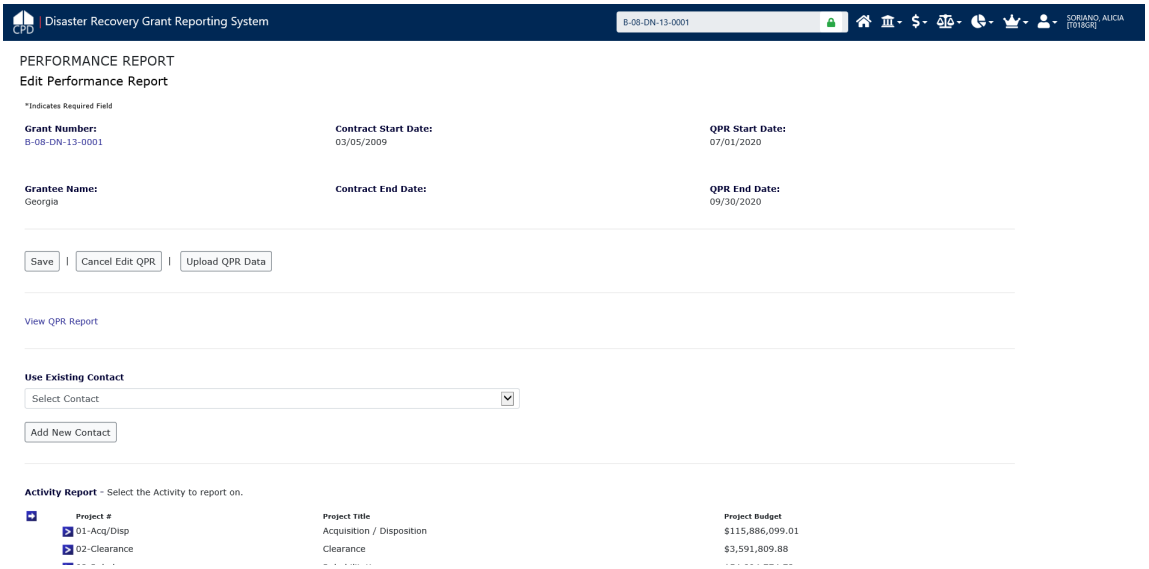
2 On the **"Performance Report"** page, select **<Edit>** under the "Actions" column next to the desired Performance Report.

User Role: Grantee User	**Menu Option:** Manage Performance Report



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 Review Tools	08/17/2020		Reviewed and Approved	B68510 - Tremblay, Kathleen
04/30/2020	01/01/2020 - 03/31/2020	View Delete Download Print Version Review Tools	08/14/2020		Reviewed and Approved	B68510 - Tremblay, Kathleen
01/30/2020	10/01/2019 - 12/31/2019	View Delete Download Print Version Review Tools	08/14/2020		Reviewed and Approved	B68510 - Tremblay, Kathleen
10/30/2019	07/01/2019 - 09/30/2019	View Delete Download Print Version Review Tools	08/14/2020		Reviewed and Approved	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	07/05/2019		Reviewed and Approved	B66364 - Mrus, Sally
01/30/2019	10/01/2018 - 12/31/2018	View Delete Download Print Version Review Tools	01/31/2019		Reviewed and Approved	B66364 - Mrus, Sally
10/30/2018	07/01/2018 - 09/30/2018	View Delete Download Print Version Review Tools	11/02/2018		Reviewed and Approved	B66364 - Mrus, Sally
07/30/2018	04/01/2018 - 06/30/2018	View Delete Download Print Version Review Tools	07/26/2018		Reviewed and Approved	B66364 - Mrus, Sally
04/30/2018	01/01/2018 - 03/31/2018	View Delete Download Print Version Review Tools	05/04/2018		Reviewed and Approved	B60338 - Jackson, Lorean
01/30/2018	10/01/2017 - 12/31/2017	View Delete Download Print Version Review Tools	01/29/2018		Reviewed and Approved	B55502 - Mykytyn, Dana
10/30/2017	07/01/2017 - 09/30/2017	View Delete Download Print Version Review Tools	11/01/2017		Reviewed and Approved	B55502 - Mykytyn, Dana
07/30/2017	04/01/2017 - 06/30/2017	View Delete Download Print Version Review Tools	07/25/2017		Reviewed and Approved	B55502 - Mykytyn, Dana
04/30/2017	01/01/2017 - 03/31/2017	View Delete Download Print Version Review Tools	05/03/2017		Reviewed and Approved	B55502 - Mykytyn, Dana
01/30/2017	10/01/2016 - 12/31/2016	View Delete Download Print Version Review Tools	01/26/2017		Reviewed and Approved	B55502 - Mykytyn, Dana

2 On the **"Edit Peformance Report"** page, select **<Upload QPR Data>**.



3 Proceed to Section E Completing Data Uploads to complete the process.

C. Manage My Financials Module Uploads

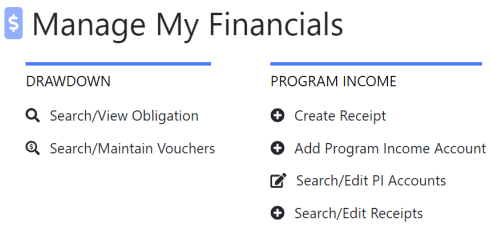
C1. Grantee| Upload Obligations

User Role: Grantee Drawdown User	**Menu Option:** Search/Edit Obligation
Purpose: Allow Grantee Users to access Obligation Uploads.	

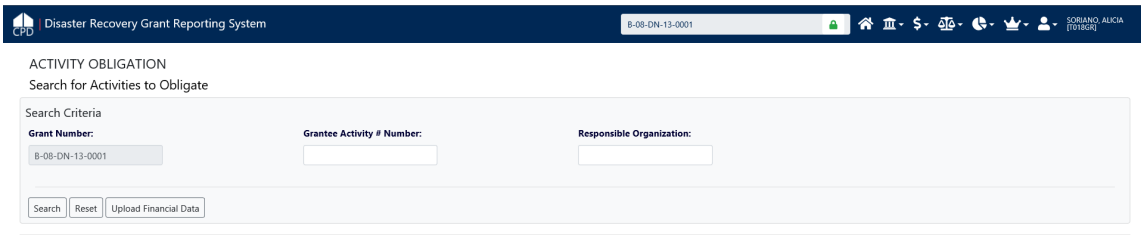
User Role: Grantee Drawdown User	**Menu Option:** Search/Edit Obligation

Complete the following steps to access Obligation Uploads:

1 Navigate to the **Manage My Financials** module, locate the **Drawdown** menu, and select **<Search/View Obligations>**. The **"Activity Obligation"** page will load.



2 On the **"Activity Obligation,"** select **<Upload Financial Data>.**



3 Proceed to Section E Completing Data Uploads to complete the process.

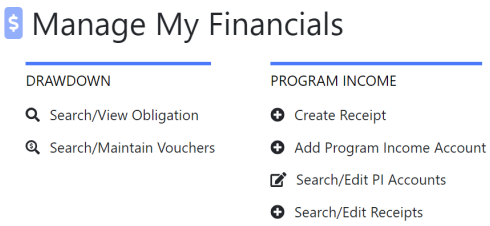
C2. Grantee| Upload Vouchers

User Role: Grantee Drawdown Request User	**Menu Option:** Create a Voucher

Purpose: Allow Grantee Users to access Voucher Uploads.

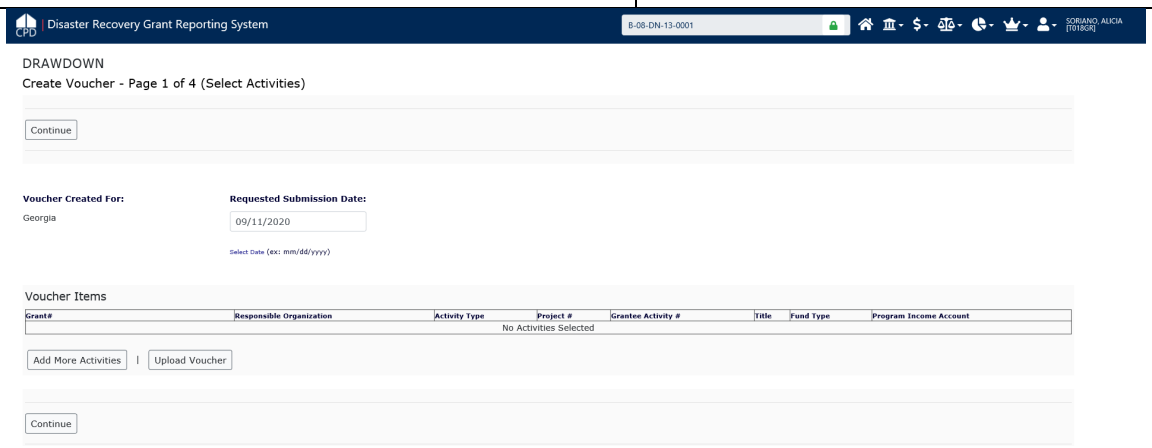
Complete the following steps to access Voucher Uploads:

1 Navigate to the **Manage My Financials** module, locate the **Drawdown** menu, and select **<Search/Maintain Vouchers>**. The **"Drawdown"** page will load.



2 On the **"Drawdown"** page, select **<Upload Voucher.>**

User Role: Grantee Drawdown Request User	**Menu Option:** Create a Voucher



3 Proceed to Section E Completing Data Uploads to complete the process.

D. Administration Module Uploads

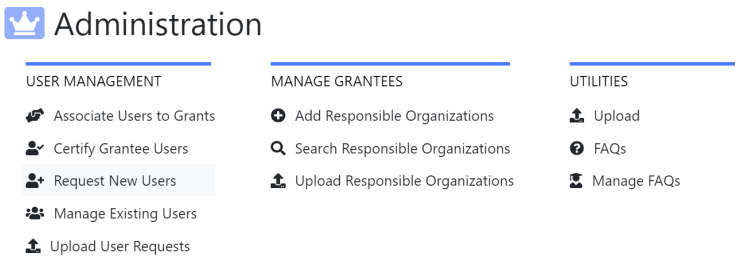
D1. Grantee and HUD | Upload User Requests

User Role: Grantee and HUD User Profile Request	**Menu Option:** Upload User Requests

Purpose: Allow Grantee and HUD Users to access User Request Uploads.

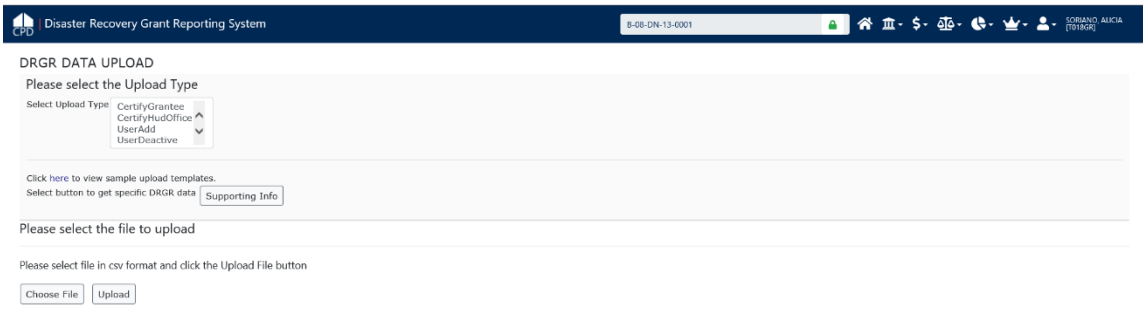
Complete the following steps to access User Request Uploads:

1 Navigate to the **Administration** module , locate the **User Management** menu, and select **<Upload User Requests>**. The **"DRGR Data Upload"** page will load.



2 Once the **"DRGR Data Upload"** page loads, proceed to Section E Completing Data Uploads to complete the process.

User Role: Grantee and HUD User Profile Request	**Menu Option:** Upload User Requests



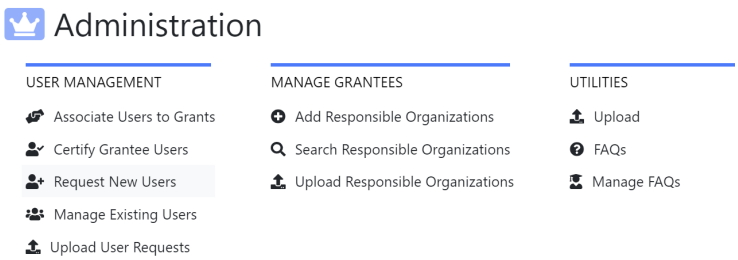
D2. Grantee | Upload Responsible Organizations

User Role: Grantee User	**Menu Option:** Upload Responsible Organizations

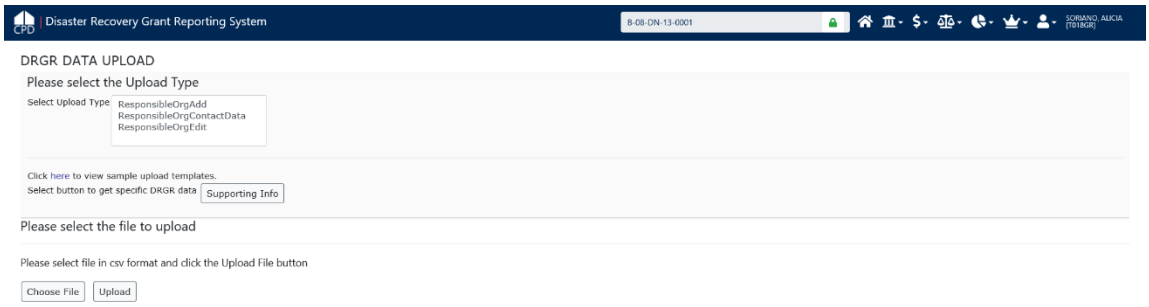
Purpose: Allow Grantee Users to access Responsible Organization Uploads.

Complete the following steps to access Responsible Organization Uploads:

1 Navigate to the **Administration** module , locate the **User Management** menu, and select **<Upload User Requests>**. The **"DRGR Data Upload"** page will load.



3 Once the **"DRGR Data Upload"** page loads, proceed to Section E Completing Data Uploads to complete the process.



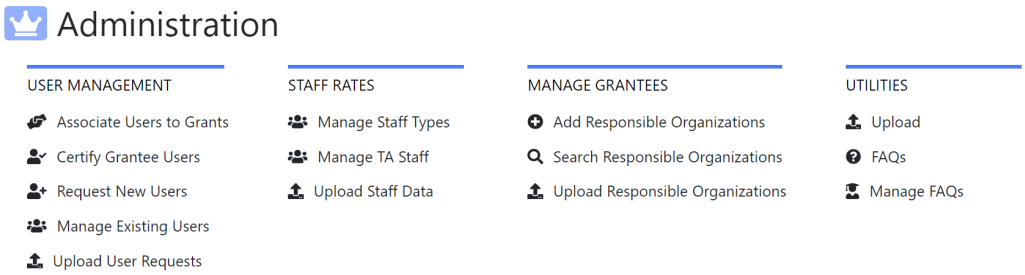
D3. Grantee and HUD | Upload Staff Data

User Role: HUD User	**Menu Option:** Upload Staff Data
Purpose: Allow HUD Users to access Staff Data Uploads.	

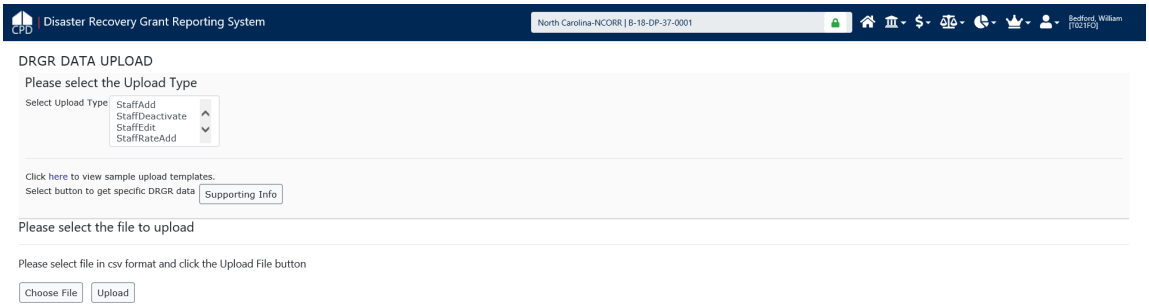
Complete the following steps to access Staff Data Uploads:

1 Navigate to the **Administration** module , locate the **Staff Rates** menu, and select **<Upload Staff Data>**. The **"DRGR Data Upload"** page will load.

TIP! Users must have the Staff Rate role to perform these functions.



2 Once the **"DRGR Data Upload"** page loads, proceed to Section E Completing Data Uploads to complete the process.



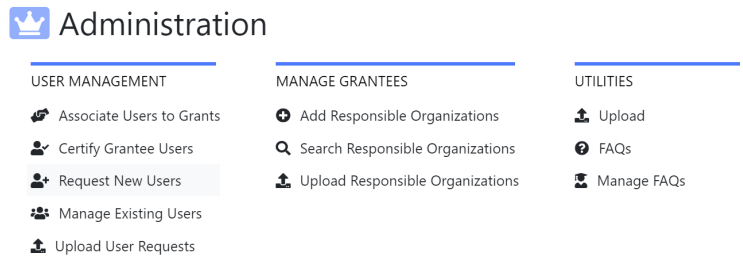
D4. Grantee and HUD | Batch Uploads

User Role: Grantee and HUD User	**Menu Option:** Upload
Purpose: Allow Grantee and HUD Users to access Batch Uploads.	

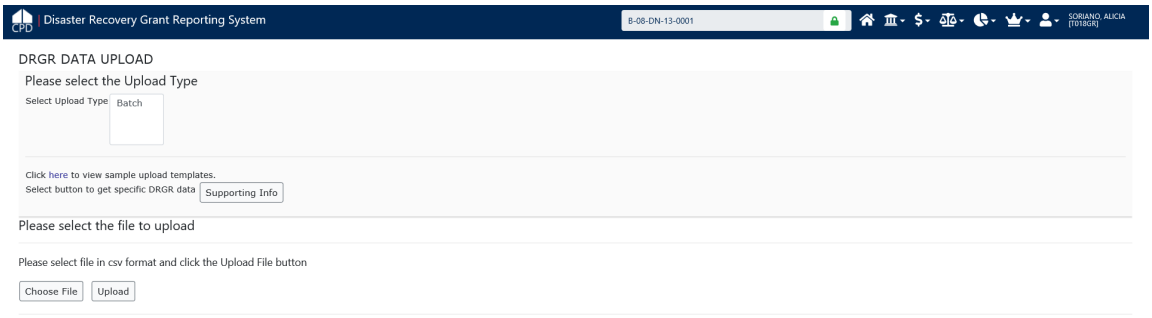
Complete the following steps to access Batch Uploads:

1 Navigate to the **Administration** module , locate the **Utilities** menu, and select **<Upload.>**

User Role: Grantee and HUD User	**Menu Option:** Upload



2 The **"DRGR Data Upload"** page will load.



3 Proceed to Section E Completing Data Uploads to complete the process.

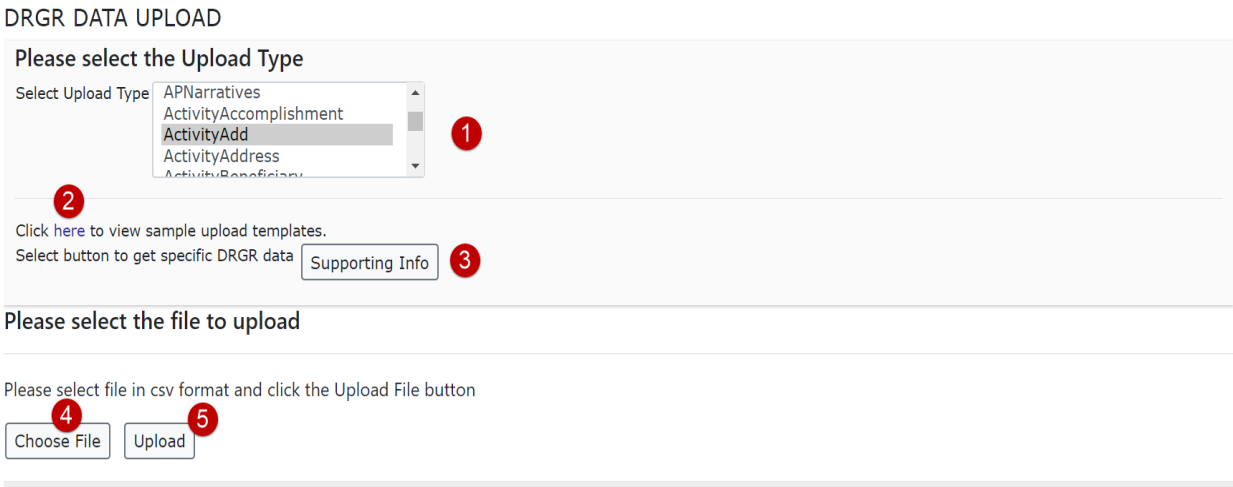
The remainder of this page is intentionally left blank.

E. Completing Data Uploads

DRGR Users should only complete the following steps after completing the steps in Sections B, C, or D.

E1. Grantee and HUD | Select Upload Template and File

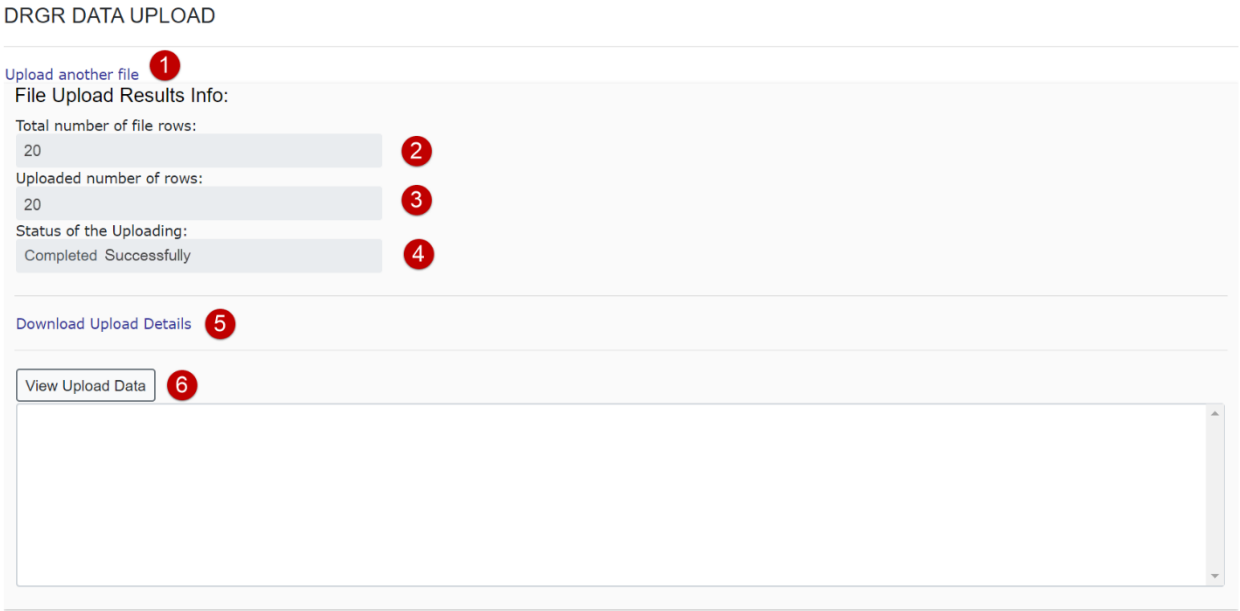
The following page/options will load regardless of the Upload Template selected for upload.



#	Function
1	Select the Upload Type – this tells DRGR what Upload Template the user is trying to upload (type of data upload the user is attempting, and where to place the uploaded data).
2	**Optional:** Selecting the "here" link is optional and will navigate the user to the predesigned templates available for use at https://www.hudexchange.info/resource/3703/drgr-data-upload-templates/.
3	**Optional:** Selecting **<Supporting Info>** is optional and will allow users to see existing data already entered into DRGR. For example, if a user is not sure about the data, they have previously entered into DRGR, they can use the "Supporting Information" function. Users will be brought to a MicroStrategy page where they can run the report with the existing data. Grantees are encouraged to use this feature to assist with creating upload files; and/or to pull existing data such as DRGR Activity # and Responsible Organization names that can be used for uploads. **Note:** the "Supporting Information" files have additional reference data to help Grantees conduct an analysis and quality control for uploads. This information might include budgets and projected accomplishments. All extra columns must be deleted before any files are uploaded.
4	Select **<Choose File>** to locate the template the user has already completed and is attempting to upload (e.g., the file the user saved to their computer).
5	Select **<Upload>** to complete the upload for the template the user located in Step #4.

E2. Grantee and HUD | Verify Results of Data Upload

The following page/options will load regardless of the Upload Template selected for upload and will display after the steps in Section E1 are completed.



#	Function
1	Option to return to the previous screen (Upload Page) to upload another file.
2	Displays the total number of rows in the uploaded file.
3	Displays the total number of rows successfully uploaded from the uploaded file.
4	Displays the status of the upload: • "Completed Successfully" indicates that the upload was a success with no errors; or • "Completed with Errors" indicates that some or all rows were not uploaded successfully.
5	Shows the user the errors or successes of each row. To review error messages associated with each Data Upload Type, consult the "DRGR Data Upload Error Messages Quick Guide" on the HUD Exchange.
6	Shows the user which data was successfully uploaded. If the "Status of the Uploading" returned "Completed with Errors", selecting **<View Upload Data>** will show the user only the line items that uploaded successfully.

Chapter 35: Reports | Data Analytics Module

Chapter 35: Reports | Data Analytics Module 1

A. (Data Analytics Module Access 1

A1. Grantee and HUD | User Access 1

B. (MicroStrategy Reports Summary 2

B1. MicroStrategy Reports Overview 2

B2. MicroStrategy Basic Navigation 3

B3. Dashboard Basic Navigation 5

C. (Accessing Reports and Dashboards 6

C1. Grantee and HUD | Accessing Shared Reports 6

C2. Grantee and HUD | Accessing My Reports 6

C3. Grantee and HUD | Accessing History List 7

C4. Grantee and HUD | Accessing My Subscriptions 8

D. (Modifying Reports 9

D1. Grantee and HUD | Moving Columns 10

D2. Grantee and HUD | Sorting Columns 10

D3. Grantee and HUD | Create a Filter 11

D4. Grantee and HUD | Grouping Columns 13

D5. Grantee and HUD | Undoing Changes 13

D6. Grantee and HUD | Changing the Report Format 14

D7. Grantee and HUD | Outline Function 14

D8. Grantee and HUD | Display Graphs 15

E. (Saving Reports 15

E1. Grantee and HUD | Saving to My Reports 15

E2. Grantee and HUD | Saving to the History List 16

E3. Grantee and HUD | Subscribing to Reports in the History List 17

F. (Exporting Reports 18

F1. Grantee and HUD | Export Report to Excel 18

F2. Grantee and HUD | Export Report to PDF 19

Appendix A: List of DRGR OLAP Reports and Corresponding DRGR Analytics Reports 21

Chapter 35: Reports | Data Analytics Module

This Chapter provides procedures for navigating, accessing, modifying, saving, and exporting reports contained in the **Reports (MicroStrategy) Module**.

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

Grantee Users

Menu Option	Subsection	Action
Reports	C1 – F2	Access, modify, save, and export reports.

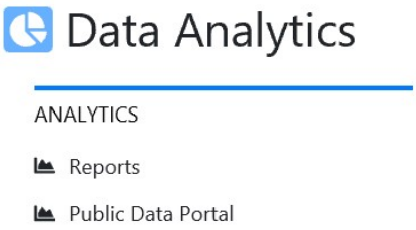
HUD Users

Menu Option	Section	Action
Reports	C1 – F2	Access, modify, save, and export reports.

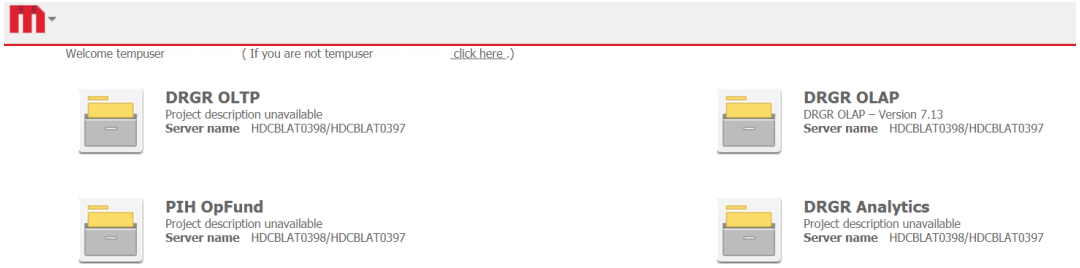
A. Data Analytics Module Access

The **Data Analytics** Module contains access to Report actions.

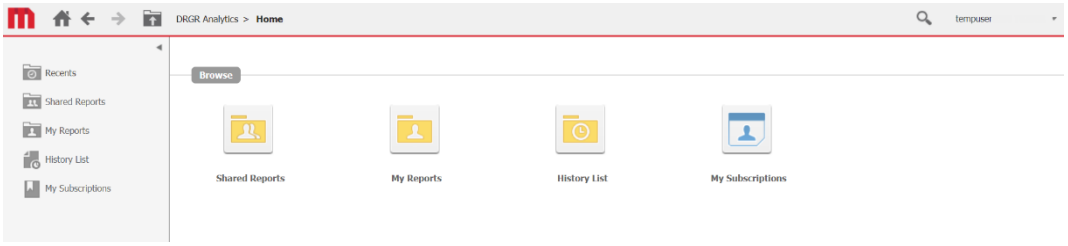
A1. Grantee and HUD | User Access

User Role: Grantee and HUD User	**Menu Option:** Data Analytics Module
Purpose: Allow Grantee and HUD Users to access the **Data Analytics** module.	
Complete the following steps to access the Data Analytics module:	
1 Select the **Data Analytics** module, or icon, located in the navigation bar.	
2 This opens the dropdown menu for the **Data Analytics** module. 	

3 Once MicroStrategy loads in a new browser window or tab, one or more of the following Reports folders will be displayed. Select the **<DRGR Analytics>** folder.



4 The "Home" page will load. From this page, all reporting actions are available.



B. MicroStrategy Reports Summary

B1. MicroStrategy Reports Overview

MicroStrategy Reports contain data entered or generated by the DRGR System (no data entry takes place in MicroStrategy). Reports are a great tool to review and troubleshoot various elements of Grant-funded programs including financial and performance data. Reports can be accessed, filtered, modified and saved in the web browser, or exported into Excel or PDF.

HUD released **<DRGR Analytics> folder in MicroStrategy** in 2020, and it works the same way as **<DRGR OLAP>**. The **<DRGR OLAP>** folder will remain available until mid-2021, at which time **<DRGR Analytics>** will replace **<DRGR OLAP>**.

TIP! Refer to Appendix A to identify the DRGR Analytics reports which correspond with the legacy DRGR OLAP reports. Also see the Data Analytics Fact Sheet under Release 8.0 on the HUD Exchange.

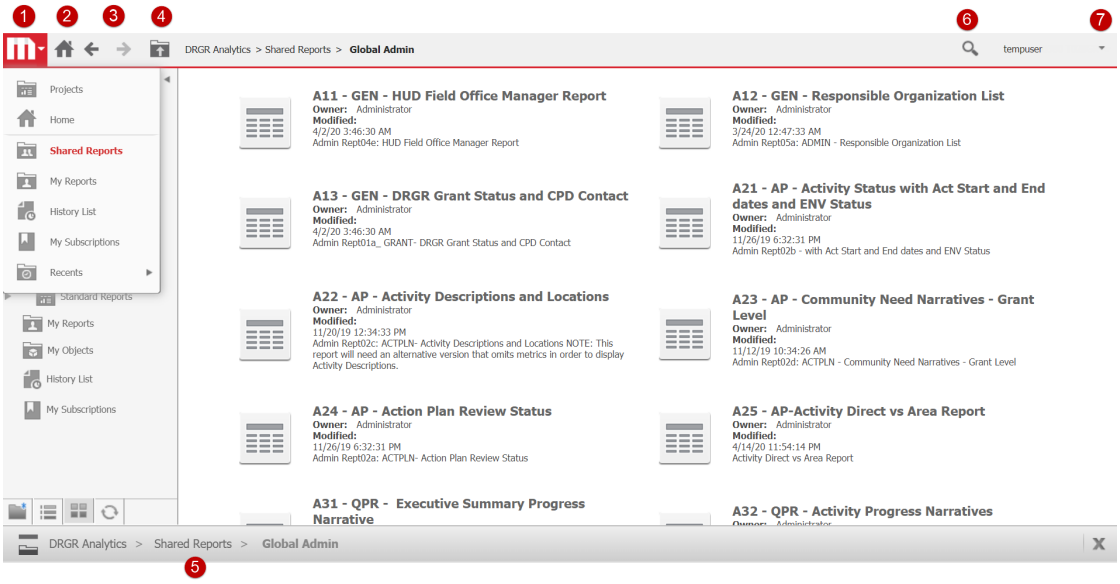
TA Providers should continue to use reports in the "TA Provider" folder in **<DRGR OLAP>** but can also use the global reports available in **<DRGR Analytics>**. TA reports will migrate to **<DRGR Analytics>** in a future System release. Non-TA Providers can use either report folder but are encouraged to use **<DRGR Analytics>.**

There are six types of shared reports in MicroStrategy: Global Admin, Global Finance, Global Performance, Global Compliance, Global History, and Global Grants. Grantees are encouraged to use these reports for tracking progress, quality control, and management of Projects and Activities.

Global Report Folder	Contents
Global Admin	Administration Report names begin with **"A##"** and contain summaries of data found in the **Administration** module including responsible organizations and user information such as certification status, roles, and associations. Administration Reports also include summary reports on Grant status, activity status, Action Plan review status, Performance Report submit and review status, and other summary information from across DRGR's modules.
Global Finance	Financial Report names begin with **"F##"** and contain data entered by users in the **Manage My Financials** module including: a) budgets, drawdowns, obligations, expenditures at the Grant-, project- and activity-level; b) program income accounts and receipts; and c) program fund and program income vouchers.
Global Performance	Performance Report names begin with **"P##"** and contain data entered by users into the **Manage My Grants** module: a) cumulative accomplishments such as housing units, FHEO data, and other performance measures (i.e. # of properties); b) area vs. direct benefit information; and c) projected vs. actual accomplishment data.
Global Compliance	Compliance Report names begin with **"C##"** and contain useful data entered by users into the **Manage My Compliance** module including flags and monitoring events.
Global History	History Report names begin with **"H##"** and allow users to view changes to data over time. The "Global History" folder is designed for audits and allows users to trace the history of Grants, vouchers, financial and other data.
Global Grants	Grant report names begin with **"G##"** and allow users to see information at the Grant level other than financial reports. See the Global Finance folder for financial reports.

B2. MicroStrategy Basic Navigation

This section provides the basic navigation for MicroStrategy. See the chart below for a description of the numbered features.

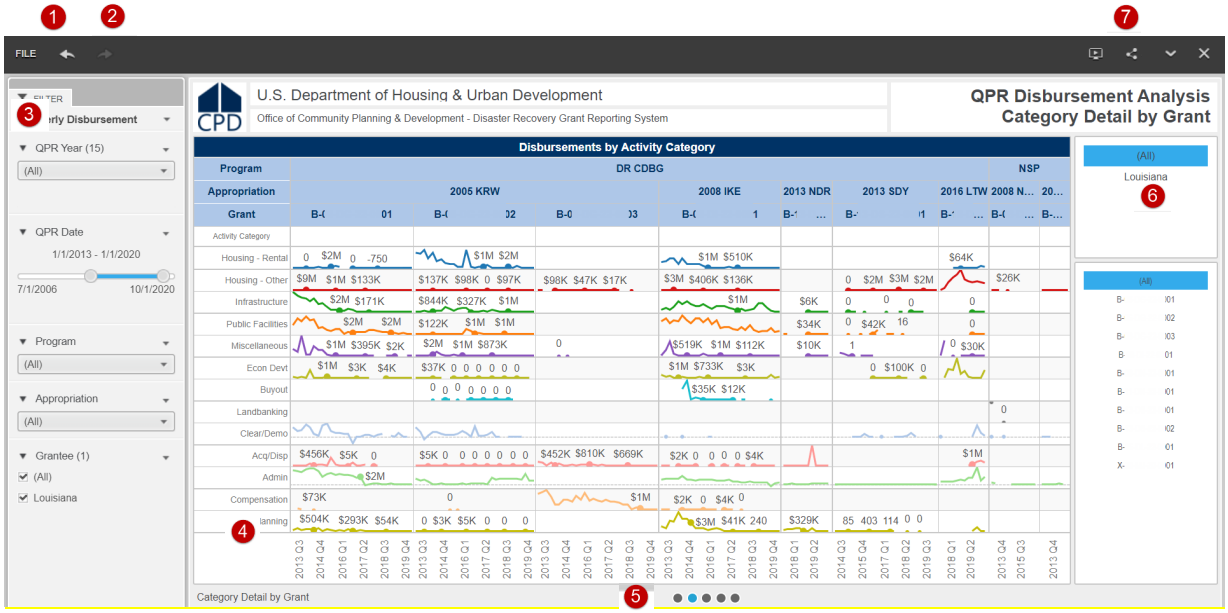


#	Icon	Function
1		Allows users to navigate to different pages/folders within MicroStrategy.
2		Allows users to navigate back to the “Home” page.
3		Allows users to navigate among previously viewed pages using the back and forward buttons. Use these buttons to toggle back and forward. **TIP:** Use the Microstrategy back and forward navigation buttons, not your browser’s buttons!
4		Allows users to navigate to the previous level within the folder hierarchy.
5		Allow users to view a history of the folders previously accessed to arrive at the current page. Users can also return to previous pages by clicking on the page name (“cookie crumb”).
6		Opens a dialogue box that allows users to search MicroStrategy.
7		Launches a dropdown menu of different MicroStrategy application-related links: Preferences, Help, About MicroStrategy, and Logout.

The remainder of this page is intentionally left blank.

B3. Dashboard Basic Navigation

This section provides the basic navigation for Dashboards which can be found within select "Global Reports" folders and are identified by the subject term "DASH" in the report title. MicroStrategy Dashboards are visual displays of key metrics and trends for records which are supported by one or more reports. These interactive charts and graphs show progress by Grant, activity category, or Grantee projects. See the chart below for a description of the numbered sections.

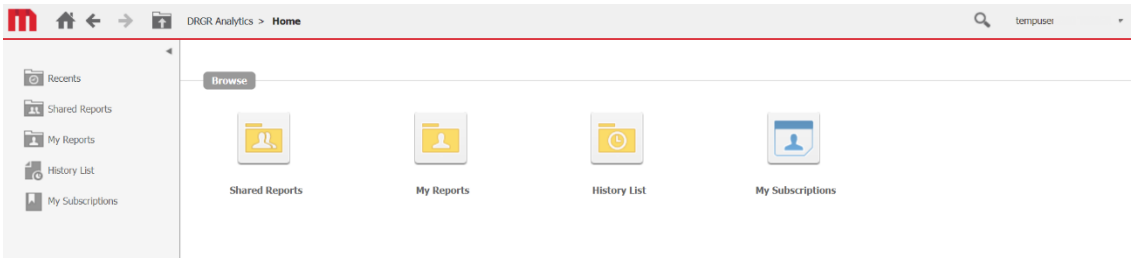
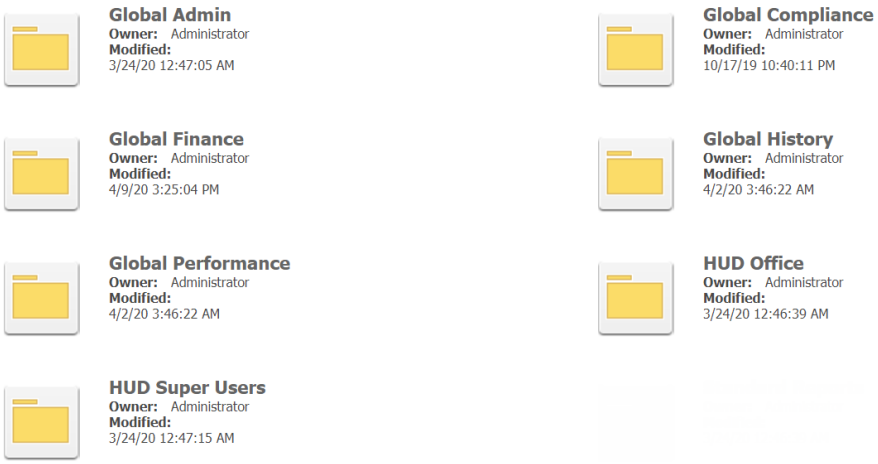


#	Function
1	Allows users to export the Dashboard to PDF, add to "History List", and Subscribe to "History List".
2	Allows users to navigate among previously viewed pages using the back and forward buttons.
3	Allows users to modify the filters for the report such as the subject area, program, and appropriation, among others. This determines what will appear on the micro-chart graphic.
4	Allows users to visualize the data based on the filters selected which helps users detect trends across categories.
5	Panel select dots allow users to toggle between different visualizations of the information.
6	Allows users to view information on which Grantee and Grant is being viewed in the micro chart.
7	Allows users to view the Dashboard in presentation mode, share the dashboard with other DRGR Users, show the MicroStrategy navigation bar, or close the report.

C. Accessing Reports and Dashboards

C1. Grantee and HUD | Accessing Shared Reports

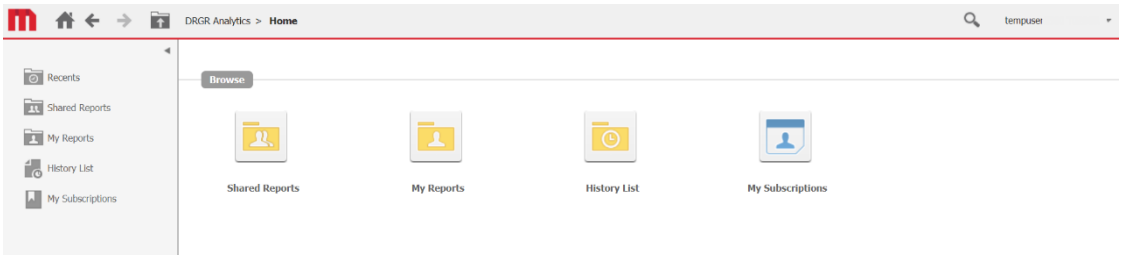
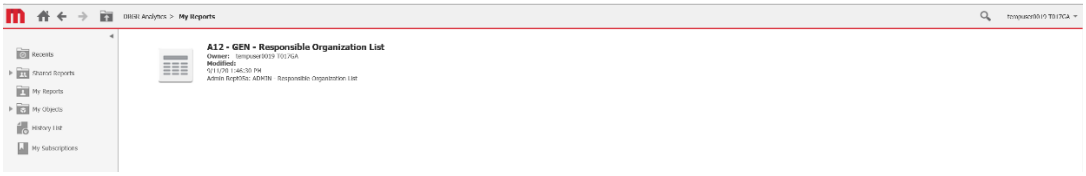
Shared Reports contain a series of pre-designed reports separated by category (e.g., Financial, Performance, etc.). The folders labeled "Global" are available for Grantee and HUD Users while the folders labeled "HUD" are only accessible by specific HUD users.

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to access Shared Reports.	
Complete the following steps to access Shared Reports:	
1 From the "Home" page, select "Shared Reports". 	
2 The "Shared Reports" page will load and display a new set of folders. Select the desired "Global" folder to access reports by category (e.g., Financial, Performance, etc.). 	

C2. Grantee and HUD | Accessing My Reports

My Reports contains reports that DRGR Users saved for future use. DRGR Users can save their favorite reports located in "Shared Reports" as-is or modify and save the report to avoid reformatting the report

each time. Reports saved in “My Reports” will keep the same format but will update with the latest data when accessed.

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to access My Reports.	
Complete the following steps to access My Reports:	
1 From the “Home” page, select “My Reports”. 	
2 The “My Reports” page will load. Select the desired report to load the report. 	

C3. Grantee and HUD | Accessing History List

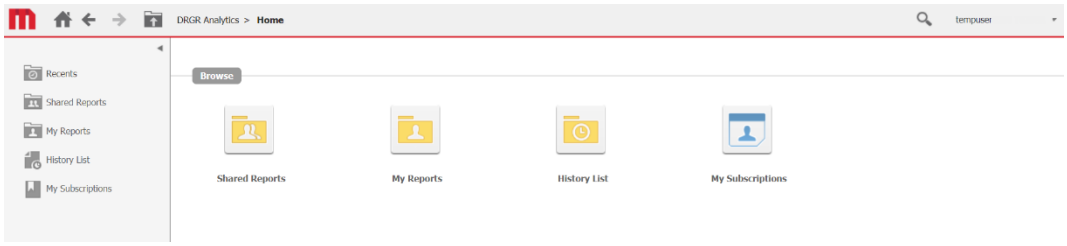
Unlike “My Reports”, the “History List” folder contains point-in-time reports generated by DRGR Users that: (

- **Save a report to the “History List”** – the report will reflect data from the day it was saved to the “History List”.
- **Subscribe to a report** – the report will be automatically delivered to the “History List” and reflect data based on the frequency of the report subscription (e.g. every Monday).

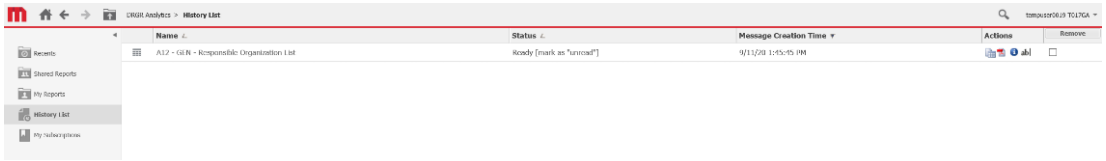
User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to access the History List.	
Complete the following steps to access the History List:	

User Role: Grantee and HUD Users	**Menu Option:** Reports

1 From the "Home" page, select "History List".



2 The "History List" page will load. Select the desired report to load. Users can also export the report by selecting the icons under the "Action" heading, or permanently delete the report from the "History List" by selecting "Remove."

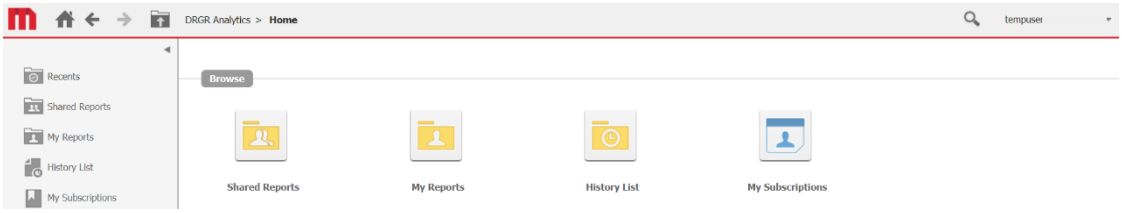


C4. Grantee and HUD | Accessing My Subscriptions

The "My Subscriptions" folder allows users to update or remove existing established subscriptions.

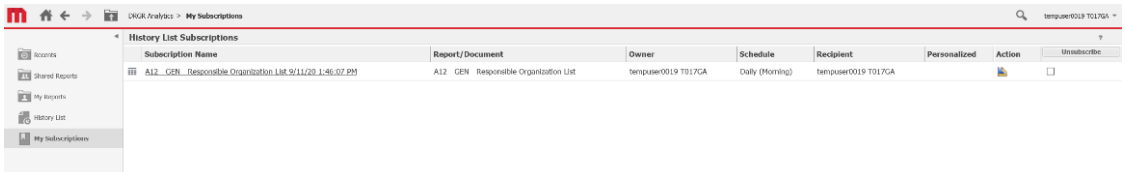
User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to access My Subscriptions.	
✔ Complete the following steps to access My Subscriptions:	

1 From the "Home" page, select "My Subscriptions."



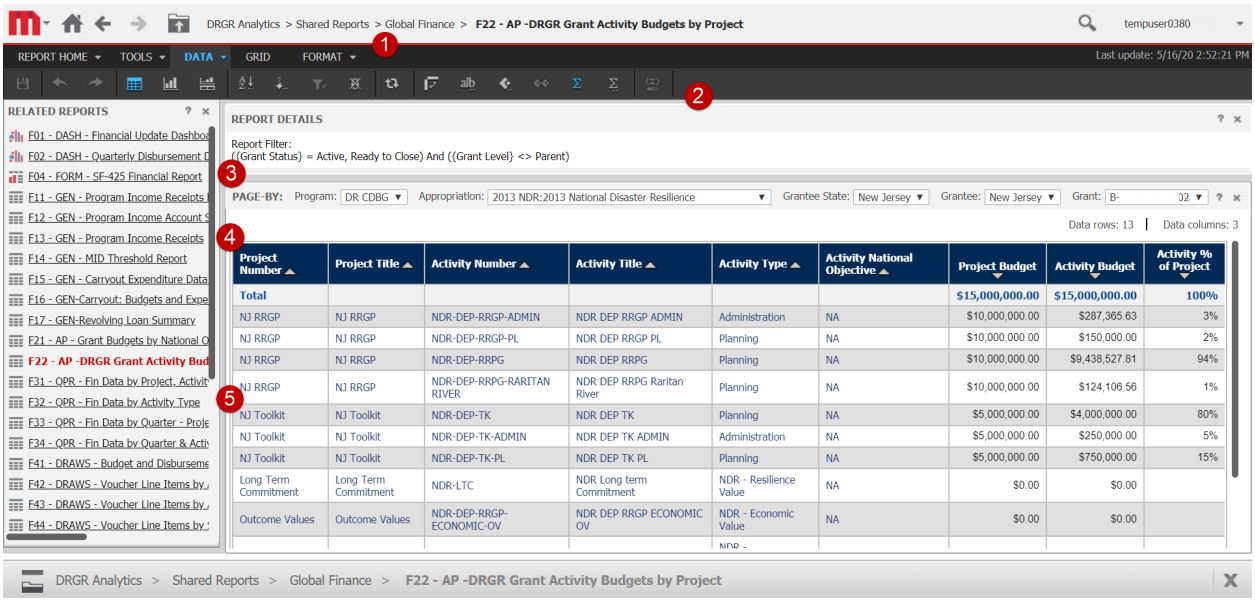
User Role: Grantee and HUD Users	**Menu Option:** Reports

2 The "History List Subscriptions" page will load. Select the desired subscription to under the "Action" heading to edit the subscription, or permanently remove the subscription from "History List Subscriptions" by selecting "Unsubscribe."



D. Modifying Reports

This section provides the basic navigation for modifying reports.



#	Function
1	There are five tabs at the top of the page: "Report Home," "Tools," "Data," "Grid," and "Format." The "Home," "Tools," and "Data," tabs contain a dropdown menu with different options based on the tab selected. The "Grid" and "Format" tabs have icons only.
2	The icons below the tabs are unique to the tab selected. Each time the user selects a new tab, the icons beneath the tab will change. The icons provide quick access to the same functions contained in the dropdown menus described above.
3	The "Page-By Axis" allows users to filter the information displayed in the report below. Each report will be prepopulated with unique "Page-By Axis" selections. For example, if a user has access to more than one Grant, the "Page-By Axis" will identify that the report is showing only information for one Grant at a time. From the "Page-By Axis", the user can select which Grant the user would like to view/edit.

4	The report column headings describe each column. Any data including text or dates (called 'Attributes') displays on the left side of the report while any data that is numeric (called 'Metrics') displays on the right. When the report displays, the data in the left columns show as merged cells any time data in the columns in each adjacent row repeats. Basically, this means that data columns on the left side group the data to the right.
5	The Report that is displayed is contingent on the options the user has selected in items 1-4 above.

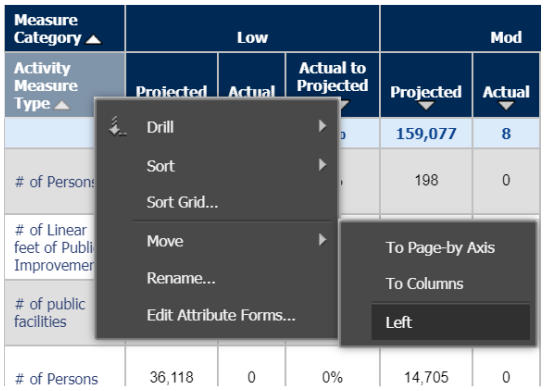
D1. Grantee and HUD | Moving Columns

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to move columns.	

Complete the following steps to move columns:

1 Once the desired report has loaded, users can move any column to left or right. The first way to accomplish this is by placing the cursor over the column header and using the left mouse button to drag and drop the column to the left or right within the report.

2 The second option involves using the right mouse button over the column. Place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select **<Move>** followed by **<Left>** or **<Right>**. It is important to note that attribute data cannot be moved to the right of metric data and vice versa.



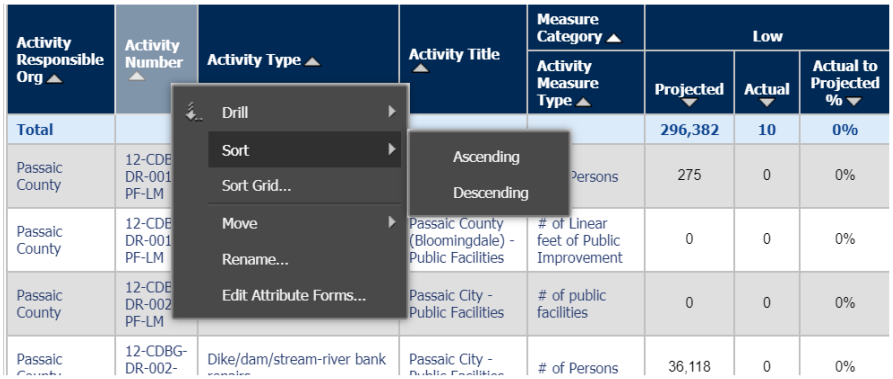
D2. Grantee and HUD | Sorting Columns

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to sort columns.	

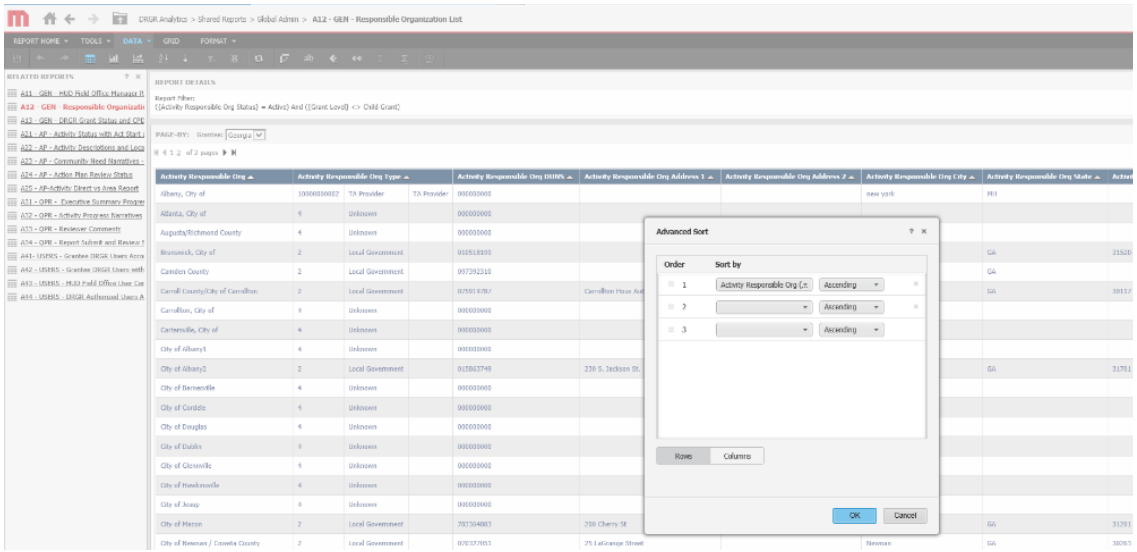
Complete the following steps to sort columns:

1 Once the desired report has loaded, users can change the sort order of any column. To accomplish this, place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select **<Sort>** followed by **<Ascending>** or **<Descending>** to alter the sorting order of the rows for that column.

User Role: Grantee and HUD Users	**Menu Option:** Reports



2 Users can also change the row sort order for up to three columns at a time. Select the "Data" tab followed by the **<Sort>** option. Users choose a column name and specify the sort order accordingly. It is important to note that when the column name options show "ID" or "DESC," choose "DESC". "DESC" specifies the order based on the text displayed. "ID" is an internal numeric index assigned by DRGR that is not useful for sorting



D3. Grantee and HUD | Create a Filter

User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to create a filter.

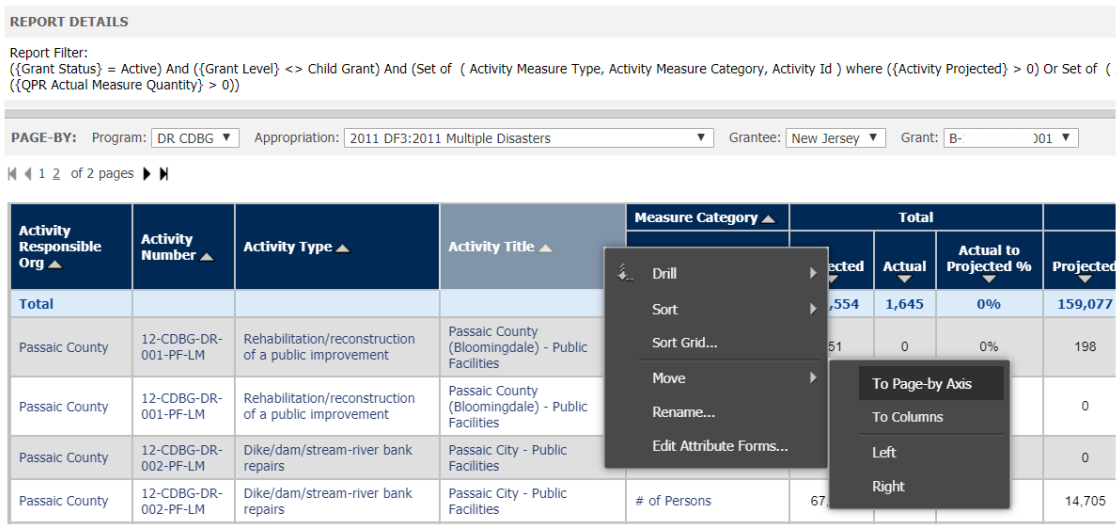
Complete the following steps to create a filter:

1 Once the desired report has loaded, users can add any column to the "Page-By Axis" to filter which data appears in the report (as opposed to all data pre-loaded into the report). The first way

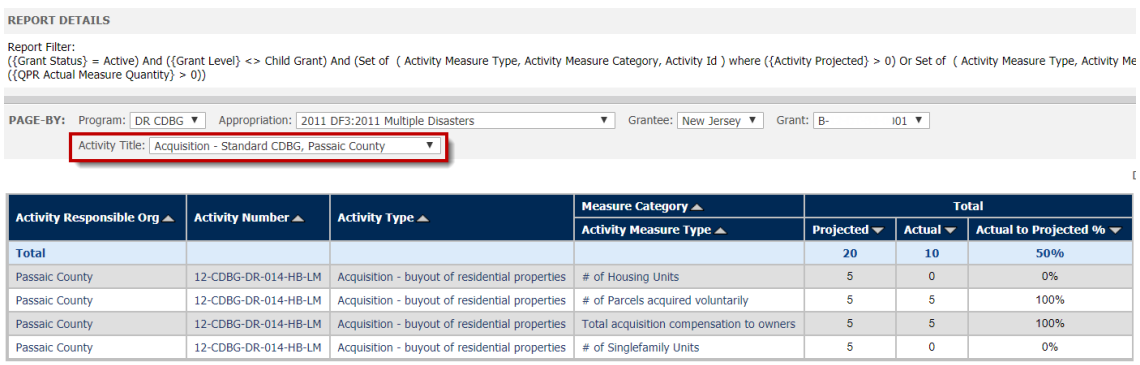
User Role: Grantee and HUD Users	**Menu Option:** Reports

to accomplish this is by placing the cursor over the column header and using the left mouse button to drag and drop the column to the "Page-By Axis" in the report.

2 The second option involves using the right mouse button over the column. Place the cursor over the desired column header and use the right mouse button to open the dropdown menu and select **<Move>** followed by **<To Page-By Axis>**.

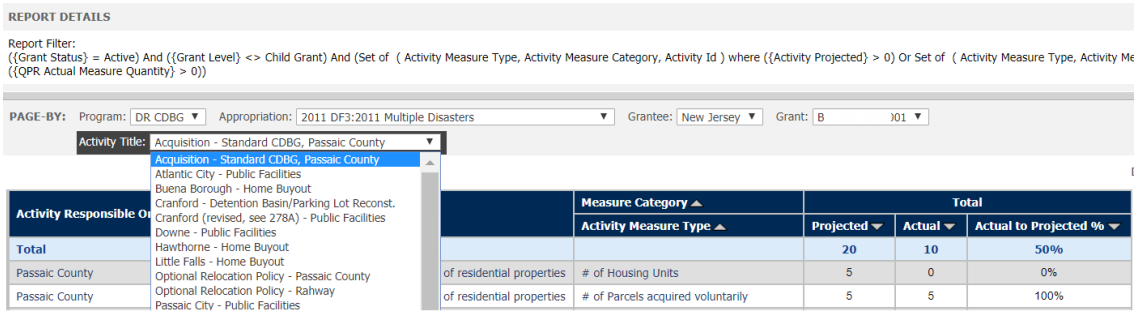


3 Regardless of the method chosen, once the selected column is moved to the "Page-By Axis," the report is filtered by the header of said column. For example, once the "Activity Title" column is moved to the "Page-By Axis," the report is filtered to only show one Activity at a time.



User Role: Grantee and HUD Users	**Menu Option:** Reports

4 Now, users can select which "Activity Title" they would like to view from the dropdown menu.



D4. Grantee and HUD | Grouping Columns

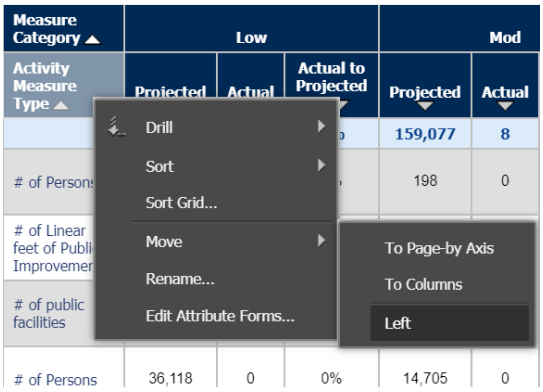
User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to group columns.

Complete the following steps to group columns:

1 Once the desired report has loaded, users can group columns and move rows to columns. Right click on the column header with the desired rows and select **<Move>** followed by **<To Columns>.**

To move columns to rows, drag and drop the column header by the rows. A yellow vertical line will appear indicating the placement of the column.



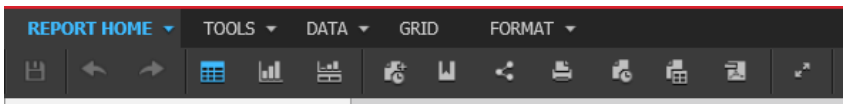
D5. Grantee and HUD | Undoing Changes

User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to undo changes to reports.

Complete the following steps to undo changes to reports:

1 Users can undo changes made to reports by selecting the **<Report Home>** tab followed by the **<Back>** icon.



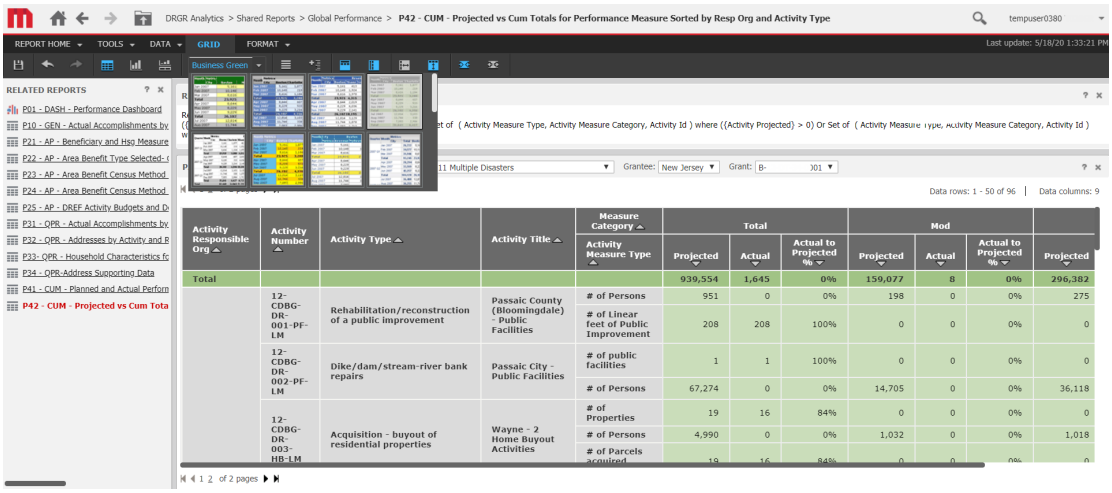
D6. Grantee and HUD | Changing the Report Format

User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to change the report format.

Complete the following steps to change the report format:

1 Users can modify the look and presentation of reports by selecting the **<Grid>** tab followed by clicking on the desired report format from the dropdown menu.



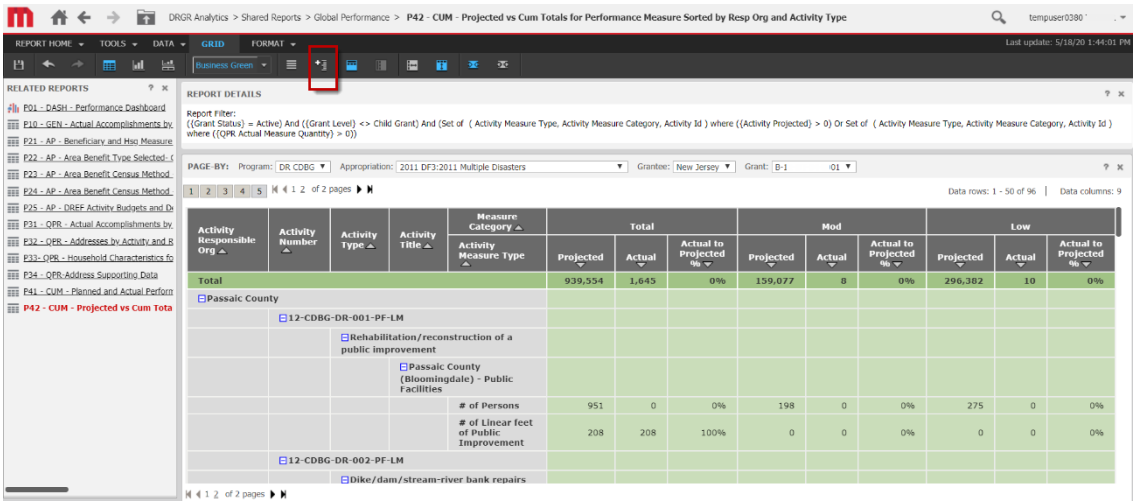
D7. Grantee and HUD | Outline Function

User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to change the report format.

Complete the following steps to change the report format:

1 Users can choose the **<Outline>** icon to collapse or expand data level displays.

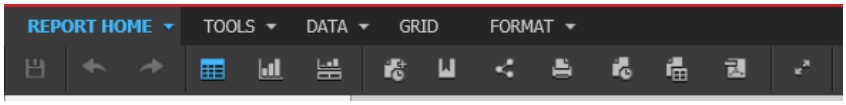


D8. Grantee and HUD | Display Graphs

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to display graphs.	

Complete the following steps to display graphs:

1 Users can display report data as graphs by selecting the **<Report Home>** tab followed by the **<Graph>** icon.



2 Once the graph is displayed another row of graphing options is displayed in the "Graph" tab. Users should consider that some reports include a significant amount of data and that as the number of columns and rows increase, graphs become more complex and may not display all data labels.

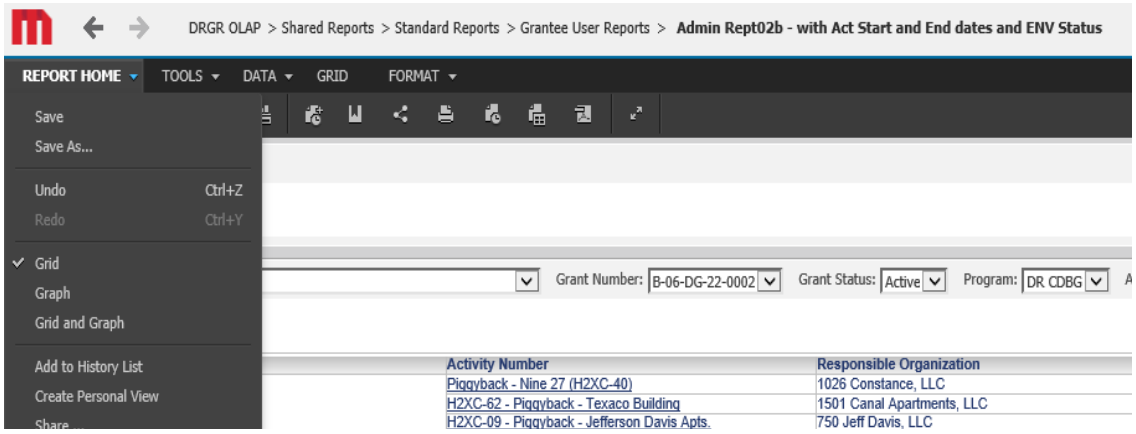
E. Saving Reports

E1. Grantee and HUD | Saving to My Reports

User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to save reports to My Reports.	

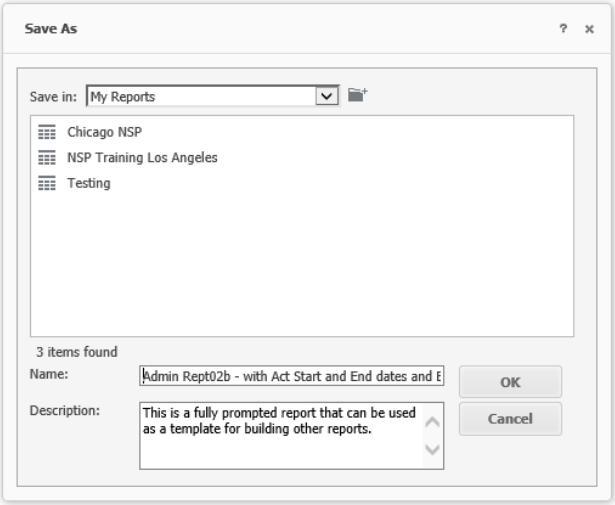
Complete the following steps to save reports to My Reports:

1 After modifying a report, select the **<Report Home>** tab followed by **<Save As>.**



2 The "Save As" window will appear. Provide a "Name" and "Description" in the applicable fields. When complete, select **<OK>.**

User Role: Grantee and HUD Users	**Menu Option:** Reports



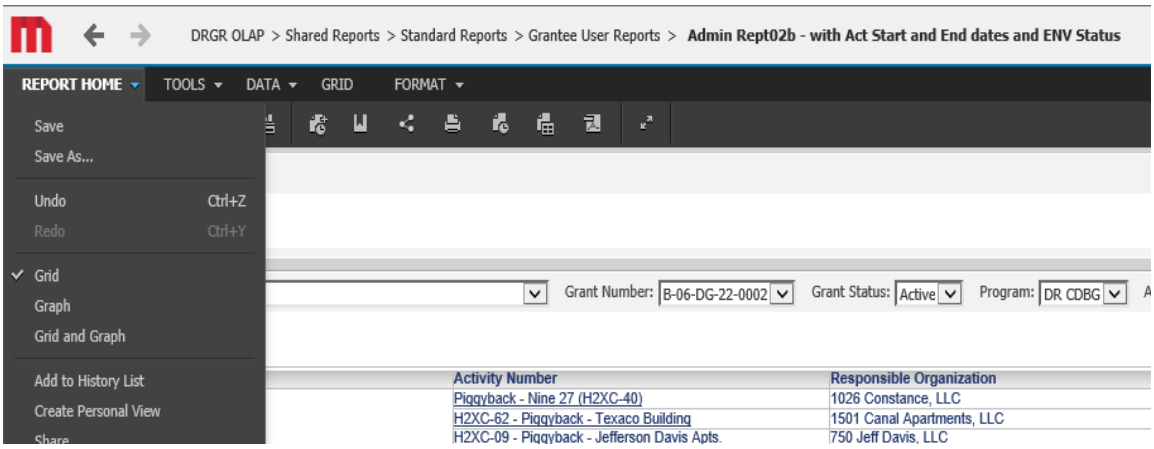
E2. Grantee and HUD | Saving to the History List

User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to save reports to the History List.

Complete the following steps to save reports to the History List:

1 Users can save a report to their "History List," which serves as the user's inbox to keep the report results for future reference. Unlike other saving methods, this option allows the user to keep the point-in-time data displayed in the report at the time it is saved. To accomplish this, select the **<Report Home>** tab followed by **<Add to History List>**.



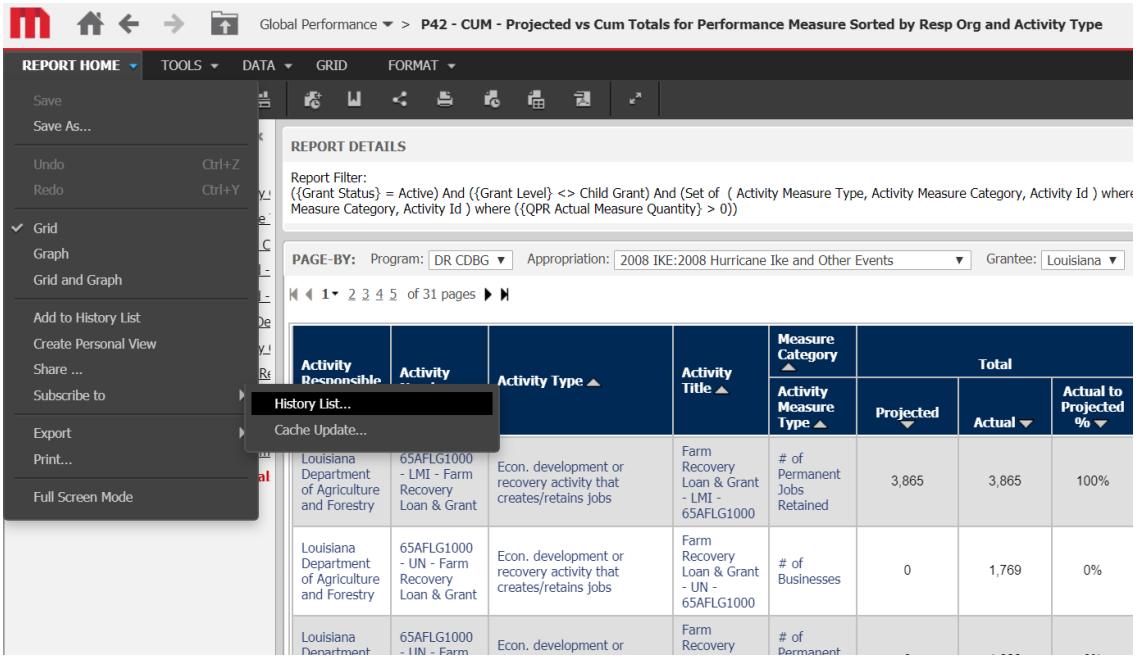
E3. Grantee and HUD | Subscribing to Reports in the History List

User Role: Grantee and HUD Users	**Menu Option:** Reports

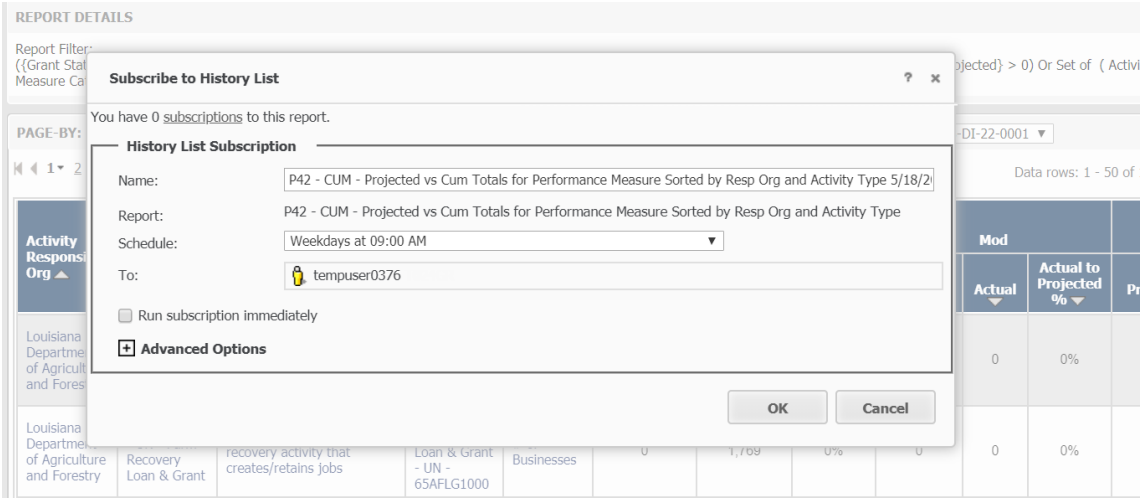
Purpose: Allow Grantee and HUD Users to subscribe to reports in the History List.

Complete the following steps to subscribe to reports in the History List:

1 Users can generate reports automatically at scheduled intervals (e.g. every Monday) as opposed to logging into the DRGR System and running each report manually. To accomplish this, select the **<Report Home>** tab, then select the **<Subscribe To>** button followed by the **<History List>** option.



2 This action generates a pop-up window that allows the User to identify the schedule for automatic report production. Once the "Schedule" field has been completed, select **<OK>.**



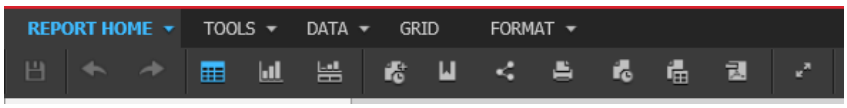
F. Exporting Reports

F1. Grantee and HUD | Export Report to Excel

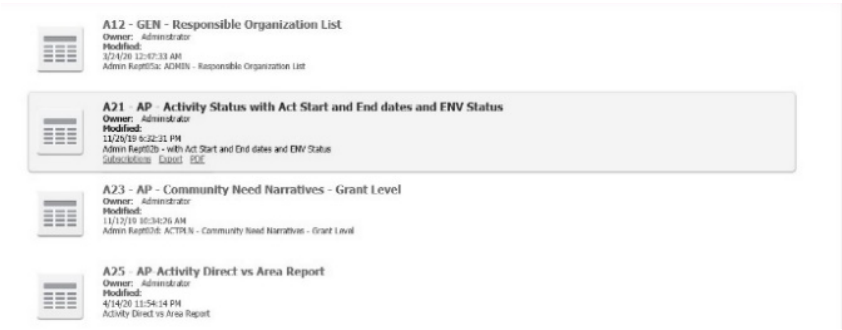
User Role: Grantee and HUD Users	**Menu Option:** Reports
Purpose: Allow Grantee and HUD Users to export reports to Excel.	

Complete the following steps to export reports to Excel:

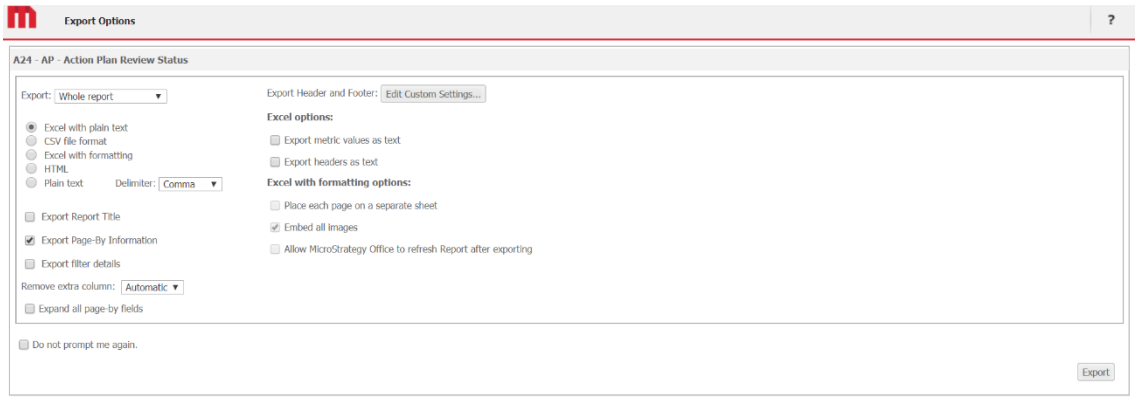
1 Reports can be exported from two locations within the DRGR System. The first is from the report screen. To accomplish this, select the **<Report Home>** tab, followed by the **<Export>** button.



2 The second method can be accessed before selecting the report to load. Move your cursor over the desired report and select the **<Export>** button that appears.

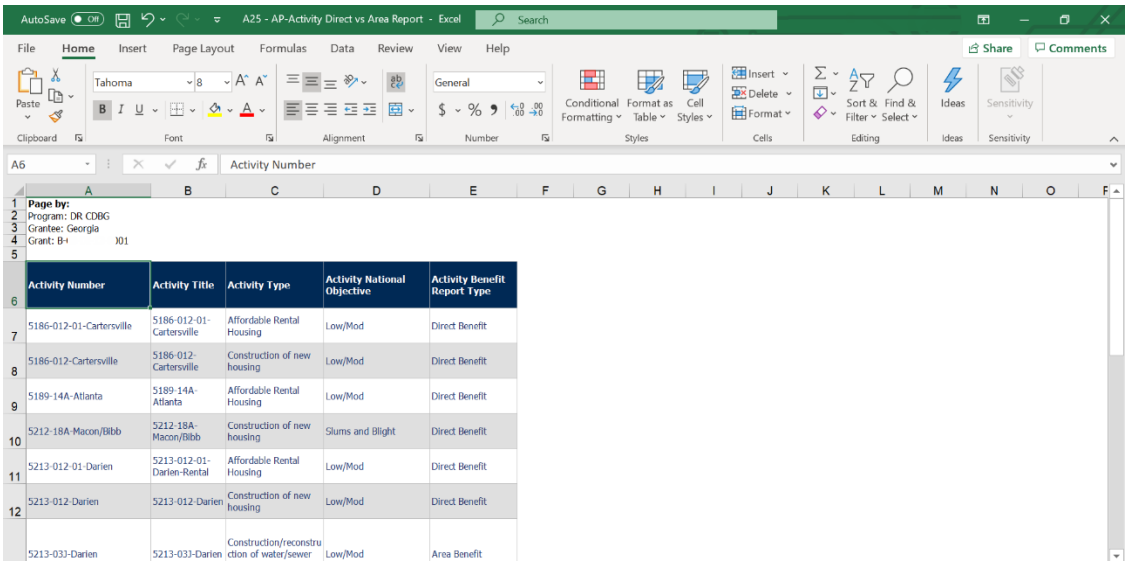


3 Regardless of the method chosen, the "Export Options" page will open in a new tab. Users may specify their exporting parameters and when complete select **<Export>**. Depending on the internet browser, Users may be prompted to open or save the file.

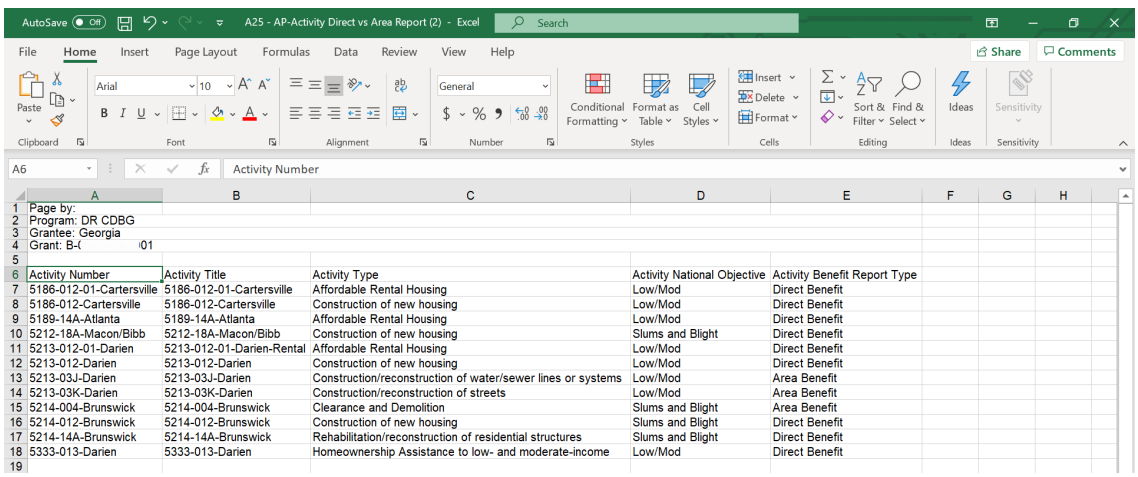


4 If a user selects the **<Excel with formatting>** export option, the Excel report will look similar to the report displayed in MicroStrategy.

User Role: Grantee and HUD Users	**Menu Option:** Reports



5 If a user selects the **<Excel with plain text>** export option, the report will export with unformatted data, thereby allowing the user to more easily edit and format the data in MS Excel.



F2. Grantee and HUD | Export Report to PDF

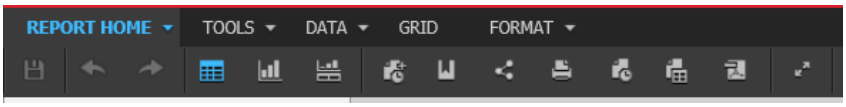
User Role: Grantee and HUD Users	**Menu Option:** Reports

Purpose: Allow Grantee and HUD Users to export reports to PDF.

Complete the following steps to export reports to PDF:

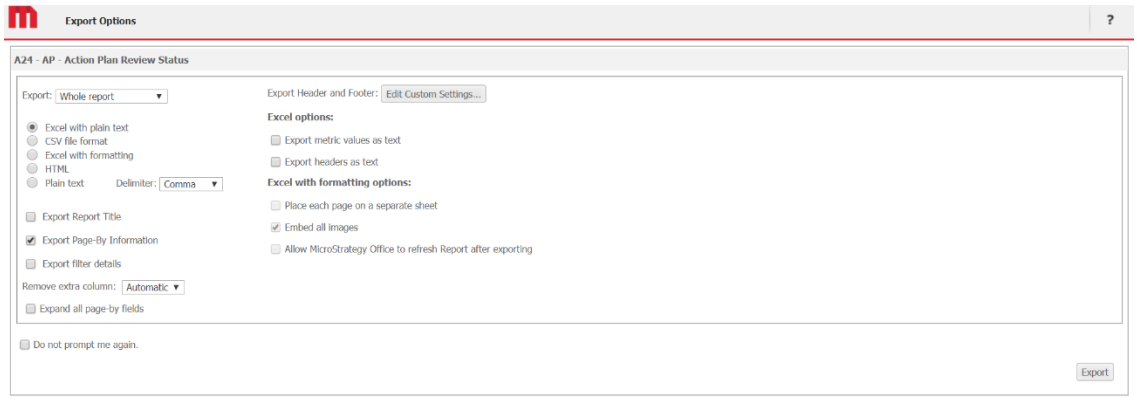
1 Reports can be exported from two locations within the DRGR System. The first is from the report screen. To accomplish this, select the **<Report Home>** tab, followed by the **<PDF>** button.

User Role: Grantee and HUD Users	**Menu Option:** Reports



2 The second method is via the Move your cursor over the desired report and select the **<PDF>** button that appears.

3 Regardless of the method chosen, the "Export Options" page will open in a new tab. Unlike the Excel exporting options, Users cannot modify the look and feel of the report or re-sort the order of the information included in the report.



The remainder of this page is intentionally left blank.

Appendix A: List of DRGR OLAP Reports and Corresponding DRGR Analytics Reports

Below is a listing of legacy reports from DRGR OLAP and the corresponding reports in the new DRGR Analytics folder.

Legacy Name in DRGR OLAP	Report Name in DRGR Analytics
Admin Rept04e: HUD Field Office Manager Report	A11 - GEN - HUD Field Office Manager Report
Admin Rept05a: ADMIN - Responsible Organization List	A12 - GEN - Responsible Organization List
Admin Rept01a_ GRANT- DRGR Grant Status and CPD Contact	A13 - GEN - DRGR Grant Status and CPD Contact
Admin Rept02b - with Act Start and End dates and ENV Status	A21 - AP - Activity Status with Act Start and End dates and ENV Status
Admin Rept02c_ ACTPLN- Activity Descriptions and Locations	A22 - AP - Activity Descriptions and Locations
Admin Rept02d: ACTPLN - Community Need Narratives - Grant Level	A23 - AP - Community Need Narratives - Grant Level
Admin Rept02a: ACTPLN- Action Plan Review Status	A24 - AP - Action Plan Review Status
Activity Direct vs Area Report	A25-AP-Activity Direct vs Area Report
Admin Rept03b: QPR - Exec Summary Progress Narrative	A31 - QPR - Executive Summary Progress Narrative
Admin Rept03c: QPR Activity Progress Narratives	A32 - QPR - Activity Progress Narratives
Admin Rept03d_ ACTPLN- Activity Descriptions and Locations; Admin Rept03d: QPR - Reviewer Comments	A33 - QPR - Reviewer Comments
Admin Rept03a: QPR - Report Status	A34 - QPR - Report Submit and Review Status
Admin Rept04a: USERS - Grantee DRGR Users Account Status	A41- USERS - Grantee DRGR Users Account Status
Admin Rept04b: USERS - Grantee DRGR Users with System Role and Certification Status	A42 - USERS - Grantee DRGR Users with System Role and Certification Status
Admin Rept04d: USERS - HUD Field Office User Certification Status	A43 - USERS - HUD Field Office User Certification Status

Admin Rept04f: USERS - DRGR Authorized Users Access by Grant	A44 - USERS - DRGR Authorized Users Access by Grant
Admin Rept05b: ADMIN - Oversight Events - Event Level	C11 - GEN - Oversight Events - Event Level and topic level
Admin Rept06c: Flag Details (QPR Level)	C12 - GEN - Flag details (QPR Level)
Admin Rept06b: Flag Details (Grant Level)	C13 - GEN - Flag details (Grant Level)
Admin Rept06a: Flag Details (Activity)	C14 - GEN - Flag details (Activity Level)
Financial Update Dashboard	F01 - DASH - Financial Updates Dashboard
Quarterly Disbursement Analysis	F02 - DASH - Quarterly Disbursement Dashboard
Fin Rept01: SF-425 Financial Report	F04 - FORM - SF-425 Financial Report
Fin Rept05c: Receipts by Project and Activity	F11 - GEN - Program Income Receipts by Project and Activity
Fin Rept05d: Program Income Account Summary	F12 - GEN - Program Income Account Summary
Fin Rept05e: PI Receipt Report	F13 - GEN - Program Income Receipts
Fin Rept06c_ MID Threshold Report	F14 - GEN - MID Threshold Report
Fin Rept07d_ Carryout Expenditure Data by Qtr - Activity Level	F15 - GEN - Carryout Expenditure Data by Qtr - Activity Level
Fin Rept07e: Fin Carryout: Budgets and Expenditures - Activity Level	F16-GEN-Carryout: Budgets and Expenditures - Activity Level
Fin Rept05e: Revolving Loan Summary	F17-GEN-Revolving Loan Summary
Fin Rept01: ACTPLN - Grant Budgets by National Objective - Activity Level	F21 - AP - Grant Budgets by National Objective - Activity Level
Fin Rept01b: ACTPLN - DRGR Grant Activity Budgets by Project	F22 - AP -DRGR Grant Activity Budgets by Project
Fin Rept07c_ QPR - Fin Data by Activity and Quarter	F31 - QPR - Fin Data by Activity and Quarter
Fin Rept09a: QPR - Fin Data by Quarter - Grant Level	F32 - QPR - Fin Data by Activity and Quarter
Fin Rept09c: QPR- Fin Data by Quarter - Project Level	F33 - QPR - Fin Data by Quarter - Project Level

Fin Rept09d: QPR- Fin Data by Quarter - by Activity Category	F34 - QPR - Fin Data by Quarter & Activity Category
Fin Rept01c: DRAWS- Budget and Disbursements by National Objective - Grant Level	F41 - DRAWS - Budget and Disbursements by National Objective - Grant Level
Fin Rept02a: DRAWS- Voucher Status by Line Item and QPR Begin Date- Grant Funds	F42 - DRAWS - Voucher Line Items by Activity and Project Incl Status and QPR Begin Date- Grant Funds
Fin Rept02b: DRAWS - Voucher Status by Line Item - Program Income	F43 - DRAWS - Voucher Line Items by Activity and Project Incl Status - Program Income
Fin Rept03: DRAWS - Drawdown Voucher Line Item Status - Grant Funds	F44 - DRAWS - Voucher Line Items by Status - Grant Funds
Fin Rept04: DRAWS - Drawdown Voucher Line Item Status by Project - Grant Funds	F45 - DRAWS - Drawdown Voucher Line Item Status by Project - Grant Funds and Program Income
Fin Rept02e_ DRAWS - Voucher Comments	F46 - DRAWS - Voucher Comments
Fin Rept05a: CUM - Program Income - Grant Level-old	F61 - CUM - Program Income - Grant Level
Fin Rept05b: CUM - Program Income - Activity Level	F62 - CUM - Program Income - Activity Level
Fin Rept06a: CUM - Fin Data - Grant Level	F63 - CUM - Fin Data - Grant Level
Fin Rept06b: CUM - Grant Funds Fin Summ - Project Level	F64 - CUM - Grant Funds Fin Summ - Project Level
Fin Rept07a: CUM - Grant Funds Financial Summ - Activity Level by Project	F65 - CUM - Grant Financial Summary - by Project and Activity
Fin Rept07a: CUM - PL 113-2 Grant Funds Financial Summ - Activity Level by Project	F66 - CUM - PL 113-2 Grant Funds Financial Summ - Activity Level by Project
Fin Rept07b: CUM - Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj	F67 - CUM - Grant Financial Summary - by Activity, Resp Org, Act Type and Nat Obj
Fin Rept08a: CUM - Grant Funds Budget and Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj	F68 - CUM - Grant Funds Budget and Cumulative Data - Activity Level by Resp Org, Act Type and Nat Obj
Fin Rept08b: CUM - Grant Funds Financial Summ - Activity Level by Project	F69-CUM - Grant Funds Financial Summ - Activity Level by Project

Fin Rept02c_ Voucher Revision Report - Grant Funds	F71 - REV - Voucher Revision Report - Grant Funds, Reasons and Comments
N/A	P02 - DASH - General Performance Dashboard
Perf Rept02b: Actual Accomplishments by Quarter HH and HU Only	P10 - GEN - Actual Accomplishments by Quarter HH and HU Only
Perf Rept04a: ACTPLN - Beneficiary and Hsg Measure Types Selected - Activity Level	P21 - AP - Beneficiary and Hsg Measure Types Selected - Activity Level
Perf Rept04b: ACTPLN - Area Benefit Type Selected- Census vs Survey - Activity Level	P22 - AP - Area Benefit Type Selected- Census vs Survey - Activity Level
Perf Rept05: ACTPLN - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level	P23 - AP - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level
Perf Rept05a: ACTPLN - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level	P24 - AP - Area Benefit Census Method - Low Mod Calculations and CTBGs - Activity Level
Perf Rept09: ACTPLN - DREF Activity Budgets and Descriptions	P25 - AP - DREF Activity Budgets and Descriptions
Perf Rept02c: QPR - Actual Accomplishments by Quarter	P31 - QPR - Actual Accomplishments by Quarter
Perf Rept03: QPR - Addresses by Activity and Responsible Organization	P32 - QPR - Addresses by Activity and Responsible Organization
Perf Rept06: QPR - Direct Benefit Activities - Beneficiary Statistics by Household Type	P33- QPR - Household Characteristics for Direct Benefit Activities by Tenure and Ethnicity
Perf Rept03b – QPR Address Supporting Data	P34-QPR-Address Supporting Data
Perf Rept01: CUM - Projected vs Cum Totals for Performance Measure Sorted by Activity Number	P41 - CUM - Planned and Actual Performance Measures by Activity and Income Level
Perf Rept02a: CUM - Projected vs Cum Totals for Performance Measure Sorted by Resp Org and Activity Type	P42 - CUM - Projected vs Cum Totals for Performance Measure Sorted by Resp Org and Activity Type

Chapter 36: Public Data Portal

Coming Soon!

Chapter 37: HUD Admin and Super User

Coming Soon!