CDBG-DR: DRGR including the QPR
3-31-16

Ryan Flanery: All right. Well, good afternoon everyone and welcome to the fourth installment in the series of webinars for the community development block grant disaster recovery program. Topic in this webinar is the Disaster Recovery Grant Reporting system, or DRGR for short. My name is Ryan Flanery and I'm the assistant director for the disaster recovery division here at HUD headquarters.

One of my primary responsibilities is the administration of the DRGR system. Been working with the system in one capacity or another for going on seven years now. I'm also joined by my colleague Tyler Bridges. He's our DRGR specialist here at headquarters and he's really the one who keeps things humming along. I'm sure many of you have worked with him in the past and if not, I'm sure will do so in the future.

Sandra Donaldson on our team is also joining us to help with questions. So if you have any questions, please feel free to take advantage of these resources and ask those questions. So during this webinar, you'll get a fairly broad overview of the DRGR system. It's basically a 30,000-foot view describing the general functionality and recording requirements.

For those of you that work in DRGR on a regular basis and are seeking some more training, we do anticipate conducting about four onsite computer-based trainings out in the field this summer that really get into the nitty-gritty of how to take full advantage of the systems' functionalities and deal with some of the more complex aspects of the recording. So please be on the lookout for those registration announcements in the near future.

So not to take up any more time, I'll end by saying that I'm pleased so many of you can join us this afternoon and thanks again for taking the time out of your busy schedules. I'll now hand it over to another DRGR veteran that does several of these trainings with Janine Cuneo with ICF. So you're in good hands. She'll be our host and presenter this afternoon. So Janine.

Janine Cuneo: Thanks so much, Ryan. As Ryan mentioned, this is our fourth of the series of webinars about CDBG-DR for our NDR grantees as well as our new CDBG-DR grantees. Specific guidelines in NDR won't be covered in these webinars, however, you'll be able to, as an NDR grantee, get familiar with the system, which will be imperative with the work you're doing in processing and working through your NDR grants.

And kudos to all of the NDR grantees out there. Some of the upcoming webinars that will be happening is as you see, today we're already doing the DRGR, the next two are going to be duplication of benefits on April 7th and environmental review on April 21st. So please be on the lookout for registration for those. Webinars are going to include some polls as well as we're going to have an ask-a-question at the end of the webinar.

I'm going to pass those off to my colleague, Chantel Key who's going to tell you a little bit about how to do the polls and also how to ask questions. Chantel?

Chantel Key: Thanks, Janine. So on your go-to webinar toolbar, you'll see a section for questions, please type your questions in that text box and you can ask your questions at any time during the webinar and at the end of the webinar is when we will read your questions out loud and we will provide you with answers. So again, on your GoToWebinar toolbar, you'll find a section for questions which is your questions text box. Janine?

Janine Cuneo: Thanks so much. So again, little bit of recap. We're doing an overview today, a lay of the land; also, to give you some administrative options and I'm going to talk about these things called modules in DRGR. There's five of them and I'm going to be focusing on all five, there's an administrative module and we're really going to go into a little bit the basics of the action plan; the QPR, quarterly performance report; the drawdown module as well as report functionality. Then we're going to do some questions as well as I'm going to show you some resources. Throughout this presentation, there's going to be these little boxes you're going to see on the right-hand side and that's where we're going to embed some quick tips for you guys.

These quick tips I find make life so much easier to work with and deal with DRGR. So don't just pass over those, listen to those and really make sure you absorb it and once you guys get back to your desks after this webinar and you read through the PowerPoints again, look at those quick tips, they'll help you throughout the process of getting to know DRGR. Before we start, I do want to tell a couple of things of what this won't be. Again, it's a beginner class; it's an overview class. We're not going to be going through screenshot by screenshot of functionality in the system. I'll present them on the screen so you get familiar with them, but it'll be like -- as Ryan mentioned, they're going to be doing multi-day courses on how to do DRGR. That literally will go screen by screen. This course will not do that, it will be giving you an overview.

It also won't be deep diving into policy questions. So you might hear me say things like, you'll have to choose your national objective. I'm not going to go into what a national objective is or what an eligible activity is. Those are actually provided to in previous webinars we had around CDBG basics. And so I want to make sure you understand there's just not time enough, unfortunately, for us to layer in policy as well as giving you a good understanding of the lay of the land for DRGR. So policy questions and us going into policy is not going to be part of this webinar. The last thing as well is we know we have some folks that are HUD representatives, either in the field or at headquarters and uniquely, you guys have sometimes different screens that you see as a HUD representative and user.

And so we're not going to be going into those screens at all or talking you through the process of how you might need to approve something. There's a DRGR user manual that came out in January, 2016. I can't say enough of how great this manual is. It both gives you examples of what you would be seeing, how you're supposed to do it, what are the elements you need to think about step by step.

And in almost section, it talks about as a field office rep or CPD rep what do you need to be looking at. So please make sure you look at that manual and you'll get that. What this webinar will do for you, though, as CPD representatives in HUD is it will be able to let you see what a grantee sees, what are their screens that they're seeing, what is their requirement and that sometimes is what I find really helpful from your vantage point. So I hope this does help that.

We're going to start off by a quick poll and then we're going to have -- I think we have three or four polls throughout this webinar. So you guys are going to want to pay attention, there's going to be little quizzes throughout. The first two polls, though, are very easy. My goal is to figure out a little bit more about who you are out there so that I'm able to correct some of the language I'm going to say in this webinar for you for who you are. So I'm going to pass out the two first polls over to Chantel who's going to go ahead and read them and walk you through how to do the polling. Chantel.

Chantel Key: All right. Thanks, Janine. So the first poll we have is do you consider yourself a staffer that works on the fiscal side or the program side? The polls are now open. And we have about 60 percent of our participants voted so far. So we'll just keep this open for a couple more seconds. I'm closing and sharing the results. And we have 28 percent voted fiscal and 73 percent is program.

Janine Cuneo: Great. That's very helpful. So we want to be talking a little bit more for the program purposes, but you'll see for all you fiscal folks out there that -- and a lot of times fiscal folks are also doing some of the data entry. So very important that I'll highlight some key things for fiscal folks throughout this as well. Our next poll question, go ahead, Chantel.

Chantel Key: Okay. So our next poll question, have you worked in DRGR before? If yes, how would you rate yourself? And the options are novice, intermediate and advanced. The polls are now open. And about 60 percent of our participants have voted. So I'll give it a few more seconds. I'm closing and sharing the results. And we have 59 percent voted novice, 35 percent voted intermediate and 7 percent voted advanced.

Janine Cuneo: Great. Very helpful. We'll definitely be focusing on the novice, but I'll try my best to interject a little bit of intermediate quick tips as we go throughout so that it could help you guys continue your DRGR education. And as always, for many of you that are intermediate, myself as an advanced user, always helpful for me to go back through the basics to make sure I'm kind of thinking through and understand it all correctly.

So welcome all the novices to DRGR and for those that are coming back at the intermediate and advanced level, I hope this webinar helps as well. I'm going to jump right in, a little bit of overview, again, DRGR stands for Disaster Recovery Grant Reporting. The most important thing around DRGR is trying to understand there's an information flow that happens throughout the system.

And so there's some things what I call sequencing, for a lack of a better word and that means for people to understand that when you put stuff into DRGR, it's going to be used in different modules. So if you put something in, for example, I'm going to talk to you guys about an action plan in DRGR, the information in there is going to be used when you provide your quarterly reporting or when you want to draw down money.

So there's a real sequencing that happens in information flow between all the different various functions or modules that happen in the system. And another component of sequencing that happens is your sequencing happens between you and your CPD rep. So when you put something into the system, often, not always, the rep is going to be reviewing it.

So for example, the QPR, when you enter in your information for a Quarterly Performance Report, or a QPR, you're going to be submitting that to your rep and they'll be reviewing that. And so there's a give and take that happens with the information flow that you constantly need to be aware of and thinking about. We're going to touch on that a little bit throughout this session.

Again, the other part of this is there's five modules and we're going to talk through those modules specifically, but the information flow happens through each one of those modules. And lastly, math rules. I know if you're like me, maybe you didn't love math as we were younger, but you've got to get used to the math rules in this system. And I just try to give people a basic understanding of that, as you can imagine, you're given a grant, say your grant is $7 million, you can't put in the system -- you can't request them to pay you more than $7 million.

So it's kind of a basic of a math rule; right? You're given a grant and you're not allowed to exceed that by asking them through an invoicing or vouchering system. So some basics and then there's some really hard math that happens throughout the system. There's a little bit more for the intermediate and advanced users, but what I do want to make sure [people know] is there are math rules you have to think about throughout and it's really critical that when you see error messages that come up in DRGR, I find, for folks, about 50 percent of them is because of math rules. So stop and go back to algebra 101 and think through where could a math rule be applied.

This is something for you to look at after the webinar and it's really talking through some of the sequencing that's going to happen throughout and it's going to go from both yourself to HUD and then also to LOCs or for folks that aren't familiar, it's a line of credit that's set up through treasury where you actually get your money from, and DRGR directly talks the LOCs on your behalf when you submit vouchers into the system.

So after the webinar, I want everyone to promise that you guys will go ahead and read this chart in full detail and you'll be able to start understanding the sequencing and the flow of information. Here are the five modules that we'll be talking about today and every day we talk about DRGR and it starts first with the admin module and that's where you get to assign and certify users and you're going to track some of the events that happen in your grant.

The action plan I'm going to talk a lot about today, this is your key. This is the way you set up your published plan in the system and you even get into more granular details in that published plan. You are directly talking to HUD around what you're going to be doing based on who's doing it, the responsible organization, the type of activity you're doing as well as what are some of those performance measures and accomplishments that you're going to be trying to reach.

The action plan set up is key for how you're going to draw down your funds, which is the next module or how you're going to fill out your quarterly performance reports. Again, drawdowns are money, money, money. You're going to obligate and you're going to draw and approve vouchers both for program funds and for those that may have it, program income. Quarterly performance reports is exactly what it says it is, quarterly you are required to submit progress reports to HUD and DRGR allows you do it through its system.

And so you're going to be talking most about the monetary, what happens via drawdowns and expenditures and obligations in the last quarter, but also, what kind of achievements did you get, what is an accomplishment you might've made through that quarter and you're able to tell HUD that as well as your publisher, because you're going to be publishing those or putting them on your website.

So you're both talking to HUD as well as the general public. And lastly, reports, I'm actually going to be doing a live demo of reports and the goal here is it's an optional module, but the more you get to use this report module, the better your life becomes, especially for NDR and DR grantees that have a lot of funds that flow through this system.

And the reason why is you're able to pull out information in DRGR in quick, usable, easy-to-read formats. And again, I'm going to do a live demo. That's how important I feel that is. It is optional, but very crucial for folks to start getting used to that module and really get adept at it, because it will help you in both figuring out if there's errors or issues for you to be able to present data to your colleagues in a fast and easy and sufficient way.

Basically, out of DRGR, for those that aren't familiar, on the top, we have what's called the main navigation bar and that gets you to the different modules that DRGR has. You might be familiar, the one we're seeing here is the action plan module. On the left-hand side is what's called the module navigation menu.

That is based on whichever -- the main navigation bar is highlighted in yellow, whichever one you've chosen, the module navigation menu will pop up. And so this is an example of an action plan module navigation on the left-hand side and you're able to do the various functionalities that that module [inaudible]. But please note that you're only allowed to see as much as your user role allows and we're going to talk about various user roles that happen in the system.

Each of you, you either already, if you're already in the system, have a user role and if you're not in the system and you're going to be requesting to be a user, you're going to be given a certain user role. We're going to, again, talk through those a little bit more. Lastly, on the left-hand side, under utilities, you see a FAQ and a logout, feel free to use that FAQ as well as the logout is something I want to overemphasize here. Use the logout link.

Do not just X out of your Internet Explorer, for example, use the logout to get out of DRGR. If you don't use the logout, there are times, and it happens a lot, that it makes it very difficult for you to get back into the system and you may have to wait 30 minutes for the system to reload you. So again, use the logout link. You'll notice how my quick tips up in the right-hand corner, I start with that logout link.

Another one is you're going to want to use Internet Explorer and specifically the compatibility view mode. For those that aren't familiar with how to do compatibility view mode, please look at that DRGR user manual that I talked about from January 2016 publishing and it talks how to do that. I'm at the end of this in my live demo reports; I'm going to show you where that user manual is literally on HUDExchange so no one can say they don't know where that is. I'm going to show you where that user manual is.

Also, you want to save early, save often. The DRGR can time you out after 20 minutes of inactivity. So save your information when you're doing it as you go and save often. And you're going to want to navigate using the DRGR tools, either the main navigation bar or the module navigation menu.

Do not use your browser's buttons; it really does not work. So you'll need to start getting very familiar with that main navigation bar and the module navigation menu. Again, if you recall, I talked about that module navigation bar on the left-hand side. This is an example of different type of components you will see per module and again, everyone's going to see a little bit of different components based on their user. Whatever your user is is a different type you see.

I've given some examples underneath these that basically all grantees are going to see. So for example, under the action plan, under that you're going to see things like you're going to get to view your action plan, projects and responsible organizations. Again, might be foreign words to you right now, you're going to get used to them throughout this webinar, but you'll be able to add as well as search for both projects and responsible organizations.

In many of these module navigation menus, you're going to see searches. The system allows you to do a lot of searching, which is very handy, especially for the DR and NDR grantees that are going to probably have a lot of information in here, your large grantees.

So some little quick tips I want to give you around how to search in DRGR. Once you hit search button, a new screen will come up and it will give you various inputs that you can put in for a search. And so you can do a blank search where you literally decide to put no inputs into that screen and search it and it will give you, for example, if I'm doing a search on responsible organizations, it will give me every responsible organization that we as a grantee have put in there for responsible organizations for that grant.

Partial search. I'm going to recommend that a little bit higher here and that is where you don't fill out every single box that comes up in the search criteria. You might fill out one or two or you might fill out only partially what you're looking for.

So for example, if you're trying to look for Habitat for Humanity under responsible organization and you see that you could type in the name of the responsible organization, maybe all you do is put Habitat, because you're not exactly sure if someone did "Habitat for," using the numeral value for or they literally wrote out f-o-u-r, you're not sure. And if you do it and you use the numeral "4" and someone wrote out "four," it might not show up when you do the search and most likely will not. So instead of doing a full exact search, do a partial search, just put in Habitat and it will bring up everything that's related to Habitat.

The last is the exact search and again, that's when you're going to fill out every item and do an exact search and that's going to minimize your results to exactly what you are looking for. That could be helpful, but remember, there's usually several people that are in the system. And so a partial search is usually recommended.

Here's a couple more examples of different module navigation measures that you might see. For example, in the drawdown, you're going to see obligations and draws. You can search those activities and sometimes you can also create vouchers.

On the reports module, I just want to let people know, that's actually going to open you into a new screen called MicroStrategy. And again, we're going to be able to do a live demo on reports. So I'll show you exactly how that works.

To keep going on, so the user roles, I teased you guys, there's two types of user roles for a grantee. There's going to be the basic roles and then any additional roles that you're going to add on to.

The three basic roles one user can have is a grantee admin, you could just be a regular old grantee-issued user and the last one is a view only grantee. The grantee admin is usually one person within your organization that has full access and full rights to the system in the sense that they are the ones that are going to be assigning the different users to grants, they're going to recertify and recertify users. So they have a little bit more and heavier duty to insure that the right type of users are in the system and they're consistently certified.

Regular grantee issue user is one that can do quite a bit in the system in the sense that they're able to create the action plans and activities, they're able to create QPRs. And view only, as you could imagine, is very limited. You are only able to maneuver through the system, but you're not able to do a lot of changes in the system. You'll notice on my quick tips, when you check out on Page 1-6 of the user manual, it literally gives you a full diagram of all the different functionality that each user is allowed to do.

So important to look at that, especially if you're going not be a new user and you want to find out what kind of functionality I need. Additional roles on top of these is there's going to be someone that's going to be requesting or I always like to call it creating a drawdown, basically creating the voucher in the system. There's going to be a whole other person that's going to be approving a draw down.

One person cannot have both creation and approval drawdowns in the system, it's a two-person job. And so one person will create, one person will approve. So you as a grantee will need to insure you have those duties assigned. And again, those are additional roles. So none of the basic roles automatically come with you being a creator, creating a drawdown or approving, you've got to ask for those specifically. And additionally, the submitting of action plans and QPRs.

Let's go to poll number two, Chantel, if you don't mind.

Chantel Key: Yes. Thanks, Janine. So I'm thinking one of these is not a DRGR module, which one: drawdown, action plan, coordination or admin? The polls are now open.

Janine Cuneo: A little bit of a test we've got going here to see folks think through which one was the modules we have not talked about and was not part of the five module system?

Chantel Key: And about 60 percent have voted so far.

Janine Cuneo: And Chantel, tell me how many chose coordination?

Chantel Key: So far 91 percent.

Janine Cuneo: Great. Ninety-one percent of you, give yourself a sticker and a pat on the back, that is correct. Ninety-one percent coordination is not a DRGR module. Again, action plan, drawdowns, admin, QPR and reports, those are your five modules. We're going to go into admin then. New or modified account registration, I don't know if people see, I have a little something called R7.10 and I just want to pause for a second and let people know in DRGR, like most web-based systems, it constantly is getting updated and HUD does a great job at making sure it's updated for both any new policy needs as well as glitches, etc. and so what happens is they're called Releases or this R Release. So there was a Release 7.10. You're going to see Releases 7.5, 7.6, etc.

So releases happen over time and you'll see as you get used to the system that you'll be able to note when a release comes out a listserv will come out. Read that information. It's important you stay abreast of what's happening in the system.

As of Release 7.10, there was a new way of asking for account registration. And so what you're going to do is submit your request via DRGR if you're a grantee admin user. So all the grantee admin users are going to -- there's a new user in your grantee that wants request into the system, you're going to go ahead and do that through your admin module and that's going to be request new users on the left-hand side. If you want to look and just manage your existing users, you can click also the managing existing users.

These are screenshots of your module navigation menu, your left-hand side of DRGR for a grantee admin user. The first thing you're going to do is search for the user in IDIS. So if someone already has an IDIS account, you're going to go ahead and enter their name under the request a user and it will go ahead and see and find that account so that you can transfer that to DRGR. If they don't, then you actually need to create a new user request.

So that's going to go ahead and you'll see there's going to be a couple of screenshots you're going to walk through. One of them, though, I wanted to point out was you're going to be selecting a user. So it's important if you're a grantee admin and you're going to be doing this, please stop and pause on this screen and you're going to make sure you want to select the proper user role that they're going to have and work with that person.

You know, they come to you and they're on the fiscal side and they're like, I'm going to be approving the vouchers, then you're going to want to make sure that you properly select that user role when you're requesting it. Again, for the grantee admin user, you're going to want to insure that for each grant that you have assigned the available users to that. You're going to basically put what authorizing users to be in each grant.

So those out there that have multiple grants that are happening within DRGR and maybe you've gotten DR grants for the last four years, you've got to make sure you're going into the assign and remove user screens so that you have correctly put all the users into each grant that you want. Also, there's a certification or recertification process that happens and it happens every six months where the grantee admin user is going to certify the regular grantees.

And out there for you HUD reps, you're the ones that actually certify the grant admin user for your grantees. So every six months of the grantee admin user, certify your regular grantee user. Here's a screenshot on how you're going to do that. And for you HUD reps out there, you're going to want to certify your grantee admins.

Another additional thing that happens in admin and requires, starting with our Sandy DR grantees going forward, including you NDR grantees is a screen called the monitor audit and TA event and this is where you're recording all of your monitor auditing or if you're doing any technical assistance events that you undertook, you're going to go ahead and record that in the admin module. And please let me note, this is not a monitoring system, this is purely a recording system of what you've done.

And so what happens is you're able to record monitoring visits, auditing visits as well as maybe reports or letters you've issued. I've given a little table here at the bottom of the screen that shows how a QPR gives a snapshot or a literal summary of the information that happened over the last quarter and cumulative at part of your monitoring audit and TA event screen that you did during the quarter under the admin module.

There's going to be basic levels of information you're going to be putting in, events and reports. So this is the basic data. So let me give an example here, if you're going to go out and do a monitoring of one of your subs, you're going to talk about the start and end date for that monitoring. What are the topics that you reviewed? Environmental review, for example. Maybe you've reviewed their financials. So what are some of the topics you've reviewed? So give me the basics.

And then another level of information based on each event that you had is you're going to be talking about what did you find, identify the findings or concerns that you had and detail the status and corrective actions that you took. I'm going to jump into the action plan now. Again, you guys heard me say important, it is key to your success that you have set up your action plan properly and you constantly nurture it. You'll notice on my quick tip, I jokingly put it takes a village to set it up. And why I want to note that is it takes both fiscal and program staff to work together to figure out how to set up your action plan correctly.

Really important to note, it takes everyone to think through and I also highly recommend that when you're filling out your action plan the first time, that there's going to be part of the action plan where we're going to talk about projects and activities and I highly recommend you do this offline, you do this not in DRGR first and even Excel documents, for example and really map it out. I do that in DRGR not just for action plan and set up, sometimes I even do it on drawdowns. I knock things out outside of the system first and then I go into the system and create whatever I'm doing.

So in setting up your action plan at the project and activity level, I'm going to recommend you map it out and I'm actually going to go through an example of mapping that out. So the purpose of the action plan is for you to provide both a template for your QPR, so what you're going to be reporting on as well as it's going to identify all the data you need that is required for budgets and performance goals.

It's basically your published plan in grandeur detail. So in your published plan, you might talk about the housing you're wanting to do and some of the goals, but you're not going to talk about the deep specifics that you're going to be putting into your DRGR action plan. So it's your published plan in pure detail. There's this two-tier hierarchy system.

Again, I mentioned, there's going to be projects and then underneath your projects, there's going to be activities and I'll define those for you. Changes are going to happen in the action plan and that's okay. They're either going to happen because maybe you're going to work with a new sub, it might happen because you actually had to modify your published plan and therefore, you need to reflect those modifications in your DRGR action plan, they may happen because you are going to be meeting a different set of performance goals than what you had originally thought.

So it can and will change and that is okay. Changes occur, though and you will, by way of DRGR, have to resubmit that action plan to HUD. So it's a really good idea to stay in constant communication with your CPD rep. We know that from changes coming up. So they're aware of it and know that they're going to be having to review.

The four key actions that are going to be happening at DRGR is you're going to be working at the grant overall level and that's going to be information directly related to your paper-based or your published plan and you're going to be directly putting that information in. Then you're going to be figuring out your projects and activities, narratives, budgets, national objectives you're going to be wanting to meet. You're also going to put in information about responsible organizations or who's actually on the ground doing the work and then also, you're going to be talking about your proposed performance measures and accomplishments.

Again, proposed, right, because you haven't met any of them, but key here is you've got to put those proposed performance measures and accomplishments in. If you do not, when you're actually wanting to report on what you met at your QPR stage, they may not be available to you at the QPR level.

So if you do not set up your action plan with the proposed performance measures and accomplishments, they may not be available at the QPR level. So you must put them in at the action plan. I'm going to talk you through each one of these key actions. So the first one, again, is you're going to be adding an action plan and at the high level, put your grant information. So for those out there that are going to be the first ones into the system for your new NDR and DR grants, you're going to follow [inaudible] on how to activate your grant.

A couple steps; this is quite easy. Once it's activated, then you're going to go ahead and go into the overall grant level information and you're going to literally put in what you have identified in your published plan. So examples of what you would see at the grant level overall information [inaudible] disaster damager or recovery needs. Many of these fields will exactly be what you had in your published plan. So let's copy and paste those in and get those into DRGR. Next is adding and editing projects and activities and I'm going to be honest, this is where it gets a little confusing. And so it's really important you guys hear what I'm thinking about and then go back to your communities and think that out and map it out as a group.

Setting up your projects is your first tier and then you're going to be entering activities at the second tier. All of your activities are directly related to -- projects first, activities underneath it. So for example, you've got project 1 and then activity 1A, 1B, project 2 and activity 2A, 2B. So every activity is connected to a project. Projects are major program outlined items. So for example, for your DR grantees, it could be housing, economic development, infrastructure. So what are your big groupings of work that you're looking at and that's the [inaudible].

Activities are a bit more complicated, we're going to go into that in a second. The project, as you see here, this is just a screenshot and this is when I've filled out a project correctly and you'll see here some financial data is included. For example, the grant amount is $13.7 million for this example, but the project amount they've chosen is going to be $600,000.

So that means all the activities that you create under this project, some of them cannot be over $600,000. So if you have five activities that you're going to develop under this project, the sum of all those five activities cannot be more than that $600,000 cap that you put on this project. You can always raise that project or lower it, but again, you've got to make sure that you're thinking about the relationships on those project budget to the sum of your activity budget. You might note that I put a little of our math rules in there.

Then again, you're going to put in information like a project title and a description. Here you're going to note the project number or project title. These are items that you as a grantee are going to be able to fill out. You're going to want to think about them in two different ways. The project numbering, one way I always recommend people to think about that is could you think about a project numbering or sequence that's going to help you as a grantee?

A lot of people relate those back to maybe your chart of accounts, again, get your fiscal people involved, program folks and think they might have a chart of accounts and that's going to be very helpful if you're able to mimic your chart of accounts in your DRGR activities, because you're going to be drawing down your funds at the activity level.

So when you're putting in project numbers as well as, we're going to show you in a second, activity numbers, project titles and activity titles, you're going to want to make it so that you're thinking about where else am I using this? I'm going to use, for example, numbers potentially at my chart of accounts internally. Titles, it's important you have enough information in the titles so that just anyone off the street, a public user, could understand it, but also, if you're going to pull reports or things like that, that you can easily identify things by the title, but I'm going to give some examples throughout.

Let me go into adding an activity. So there's actually four elements you need to think about when you're going to add an activity in DRGR. This is what makes it quite complex.

So you're going to first have to figure out what activity types we're talking about for the activity and that's what's the end use of this activity going to be? It could be rehabilitation of a property, for example, who's doing the work, what's the responsible organization or perhaps you're a state disaster recovery grantee and there's going to be multiple cities and counties that you're going to be working with that are going to be the responsible organizations. Perhaps you're an NDR grantee and you're going to be working with a local watershed organization that's going to be responsible for standing up a watershed community center, for example, and they're the ones that are going to be the responsible organization over that pot of funding and they would therefore be your responsible organization for an activity.

National objective. Again, not going to go into the exacts of what a national objective is or isn't here, please refer back to the other webinars that went into detail, but what is a national objective you need to meet for your activity type? And then unique [inaudible]. If you're working with a multifamily complex, they want each of those to be separated out in activity.

So with single family units, you're able to combine all those together, but if it's a multifamily, you need to break that out. I'm going to go ahead and literally give you an example of this. And so here we go, the example is we're working with a project that's going to be housing. So again, in your published plan, housing was probably for a DR grantee, one of your big, major categories. So housing is going to be my project level and here is the reality of my program.

So again, I'm mapping this out not in DRGR. There's going to be two activity types I'm going to be doing, rehab and acquisition buyout. So you might say, Janine, I only have to do two activities in DRGR, done. Not the case. You've got to remember, you've got to go back up here, there's four elements you've got to consider, so two activity types.

Now there's going to be three different responsible organizations that are going to be responsible for the rehab and acquisition. Then there's going to be all of these are going to be working with single family properties, except at this point, you know there's one multifamily complex that's going to be used. And then lastly, there's two national objectives that you're going to be meeting through these programs, an urgent need and a low/mod. I'm going to go ahead and scroll to the next.

Let's break this out now. So we know, based on all that information, again, you at program staff usually know this information, County A is going to be doing a rehab program that's going to be low/mod and they're going to be working with multiple/single family property and one multifamily complex. County B is doing the rehab program low/mod and they're also doing a buyout program low/mod. And then City B is doing a rehab program low/mod and a buyout program and they're going to be meeting both an urgent need for part of the buyout program and a low/mod benefit for part of the buyout program. So that's the program, that's what you're working with. How do I translate that into DRGR?

So I made a little bit of a map here for us. So in activity type, there's rehabs and buyouts; right? And then, though, we've got to figure out it's not so simple as just putting two activities down, because we have different counties and cities you're working with. On rehab, we know that County A is going to be doing a rehab program. So that's activity number one. Activity number three, County B is doing a rehab program as well and we also know on activity number four, City B is doing a rehab program. So we at least are doing three activities, but we also know, if you look at our breakdown, that -- oh, I'm sorry, all of these rehab programs are meeting the low/mod benefit for our national objective.

But we also know if we know County A's program, which again, program staff should know this, is that they're going to be meeting both single family properties as well as a multifamily. If you remember, if we go back to the elements that you have to think about for add activity, multifamily needs its own breakout.

So for County A, we have both activity one and two. They're going to be doing all the single family units that are going to be within activity one and then activity two will be that one multifamily complex. So we went from one activity type rehab program to four activities based on responsible organization, the national objective and there's two different types of housing we're going to be meeting, single family and one multifamily complex.

The same is done for the buyout program. Buyout program, based on our breakdown, is County B that's going to be doing a buyout program and City B is as well. And City B is a little bit more complex, because they are not just going to be meeting a low/mod national objective for part of their buyout, they're also going to be meeting an urgent need for part of their buyout. So important here that you, as a team, before you go into DRGR, map this out.

And you might say, "Janine, we're not positive how many multifamily complexes we're going to be doing yet." That's okay. What you're going to be doing is put the information you have in there as you have it in there, and again, remember how I repeated, this action plan will change. So sometimes you get different or more information or something slightly changed. And so that will mean you're going to change your DRGR action plan.

I just wanted to go over with you some screenshots. This is the edit activity screen that many of you will see. Again, the activity type is a dropdown and it's required and you're going to see a whole host of different types of activities here. And I want folks here to think through it too, some of you might have a DR grant and an NDR grant and some of you might even have NSP grants also in DRGR.

So every activity type that you have access to is based on the grant that you're working under. So they usually don't change too drastically, but they might change a little bit of what you've assumed based on the requirement of the grant you're working under. So don't make assumptions, go in there and look. Also, you're going to fill out a national objective, you're going to fill out budgets and start dates, etc.

What I really want to point out to you also is that, if you remember, I mentioned before there's a grant activity number and an activity title and this is a great example where if you look, there's a grantee activity number, I don't know about you, but I have no idea what that means. So it probably means something for them internal. You know, it might be their grantee or '08 might be their grant year, for example. So it means different things to them and I want you guys to think through those activity numbers before you just go in and put stuff down. It can really help you in matching up how it works for your accounts or if you have several grants in the system, how you insure that when you're looking at an activity, maybe in a report or QPR that it's easily identical to what year it is.

And activity title here, they've utilized this very well. I know it's working with [inaudible]. I know the kind of program and [inaudible] objective. That's one way to think about entering activity title, talking about who's doing the work, what is being done and maybe what objective you're meeting. Again, at your discretion, but think about it, HUD's got to review these and the public does and they don't understand the activity titles, you're not supporting the communication that you're required to do.

For the second part of the edit activity, there's a multiscreen and you're going to be entering in your responsible organizations and this is just a screenshot from a different grantee. And here that responsible organization is the city of Arlington. So I wanted to let you guys know there's two ways of [adding activities].

One is that you can add your responsible organization directly using the admin module. So on the left-hand side, you will see the action plan module navigation and you will see you can add a responsible organization right there and you can do that anytime. You don't have to be literally adding an activity or editing an activity to do that. You can do that completely.

And then another time you can do that, as we're doing right now, adding an activity in. You would go in there at that time and you can add all the details. The responsible organization is a whole separate screen where you're going to have to do a lot of details to add those entities, it's not just a title or a name. They're going to ask for some more specifics. Technically, there's a third way as well and it's called data upload and that's going to be a little bit of a tease.

I'm going to end this webinar with what a data upload is, so we'll get to that in a bit.

And then last is part of the editing activity screen, again, it's not the full screen, but I'm giving a little bit of an idea here is that there's some performance measures that you're going to be seeing. The list of performance measures that HUD provides to you is directly related to the activity type you chose on the first screen.

I'm going to go back a couple. Key on this activity type, the information you put in here, that tells DRGR which performance measures and accomplishments are going to come up for you to talk about. So again, it's important that you think about your activity, not just what is your activity type, what are the performance measures that you will have an option to put in, not requirement to put all of them in, but an option to put that information in.

And you're also going to be reporting by if it's going to be an area benefit or a direct benefit. You'll see that under report performance by area, benefit or direct benefit. You're going to choose one of [inaudible]. Again, not going to go into the details what area versus direct need, please look that up if you're not familiar with that or talk to the individual that's in your community that understands that.

In DRGR, the area benefit is you're going to be entering data at the action plan only and then automatically calculate information for you for QPRs. In the area benefit, you'll either do it by census screens, your summary survey information. For the direct benefit, you're going to be entering data both at the action plan and at the QPR. So for example, the stuff you're going to enter in the data and action plan are things like household, like are you going to be doing owners and renters, is it going to be multifamily or single family?

And then the staff with a QPR, you're going to tell people then how many of those owners you actually assisted, how many of those complexes you actually helped, but you're also going to give some additional information about those households or persons, such as race and ethnicity, those FHEO information that's required. Here's a little bit of an example of a direct benefit in more detail when you're setting up your activity type, if you choose direct benefit, items like households and housing units will come up and as you choose these households, you can choose renter and/or owner, for example.

And what will happen is then below, you're going to scroll down your screen, you're then going to have to put in the numbers that you are proposing to meet. Again, quick tip, the activity type drives the accomplishments and measurement options. So again, we've got activity type at the top, the rehab reconstruction and that's what's going to drive the information that you're going to be given to fill out.

I also want to give you a little bit of example, for direct benefit, if you're choosing households and you don't put renter/owner, then you will not be able to talk to HUD about what the proposed measures of renters or owners you're doing. So you've got to select one or the other.

And if you'll notice in example two, we've selected renter and now that allows you, in DRGR, to put the number of renters and then DRGR will directly calculate the number of households benefitting. Sometimes you're going not meet both. And so you'll also want to select both and you're able to put in those [inaudible] beneficiaries then. So again, not enough just to click households, you've got to look at every time you click something, what is the subset of information HUD is looking for?

Chantel, we've got another quiz going here to keep people on their toes. Can you go ahead and ask the poll?

Chantel Key: Sure. So for our next poll, it's a true or false question on activity types. Now, you're going to go ahead and launch the poll now, the polls are now open. Now, 24 percent voted so far. So I'll keep it open for just a few more moments. And it looks here that we have a widespread. So I'll go ahead and close this now and share the results. So activity types have unique performance measures associated with them that are pre-populated by HUD, 76 percent voted true and 24 percent voted false.

Janine Cuneo: Great. So that 75 percent of true, that is true and accurate. And I want to just go back, for those that said false, let's just talk that through for a second. So activity types, I'm going to go back here, those are where you're going to enter in the activity type where it's a dropdown screen.

You will have the option to choose your activity types and because it's the infrastructure, economic development or housing, NDR, you're going to probably have some very specific ones as well once HUD populates those that you're going to want to look at in how they meet and talk to your published plan. And once you choose those, they directly populate your performance measure information. So this example is one that is for rehab reconstruction. If, for example, we do something that has to do with an infrastructure project, you might see number of yards, for example, pipe being laid or if you have economic development, number of jobs created.

So these performance [measures] here are only specific to the activity types. HUD will go ahead and will pre-populate that performance measure information based on your activity type so that you could absolutely report on economic development and that's the kind of activity type you're choosing [inaudible].

We're going to go to drawdowns. I often say drawdowns is the easiest one, not necessarily because there aren't -- there's a lot of screens you have to go through [inaudible] to know, but what I find about drawdowns is that's how you get your money. And so a lot of people learn this very quickly, because getting your money and getting reimbursed is very important in DR and NDR grantees. So the purpose of the drawdown menu is all financial transactions take place there.

You also have to have two user types. So you cannot have one user, you must have two users. So what does that mean? [inaudible] your grant system must create voucher responsibility or also, it's called request vouchers. And another one is an approved voucher. What does that mean in DRGR? The system is what I call it makes you do something twice.

So in the system for vouchering, you are going to have one person create the voucher and another one approve the voucher before it's sent off to LOCs and treasury and that allows you, as a team and as a grantee, insure that you are requesting the right one so there's no manual error. So there's a creator and an approver and they're two separate people. It can't be done by the same person. So grantee admin users out there, you want to make sure that you have at least two individuals with create voucher user role and two users that have the approved voucher user role. And I say two, because you never know when someone's going to walk out the door or someone's on vacation or sick and you guys need your money.

And again, for DR and NDR grantees, especially with you guys with a lot of money that's going to be flowing, at least two. Three or four is never a bad thing. And usually, not always, they're your fiscal staff as well. So fiscal staff here, I want you guys paying really close attention to this drawdown module.

And there's primary functions that are going to happen in your drawdown, obligate funds, create vouchers and review and act on a voucher. To obligate funds in DRGR, many people ask me, how do I know when to obligate a fund? Usually and typically the trigger for obligation by a grantee is the execution of an agreement, a subrecipient or a sub-grantee agreement, for example or a contract that you have executed for goods and services. So those are examples of when you might obligate.

So if you're, for example, working with a subrecipient, when you sign your subrecipient agreement, not a bad time to go ahead and obligate those funds. And so here we have the activity obligation screen; very basic. You'll notice that you're going to -- it shows you, for that activity, your total budget, how much you've obligated to-date, how much is available for obligation.

And so again, you're going to think through the math a little bit. You know, if you're wanting to obligate more than you have available, then clear, you're not going to be able to do that full obligation. So you're going to want to look at that as well as it tells you how much you've drawn against that activity too. So it's important to think through the draws and the obligations. So all you're going to do is go ahead and put whatever new amount of obligation you want and save that amount, the information will recalculate for you and you'll be done with that obligation. It's a very quick one-screen process.

And then for submitting a voucher, there's a five-step process you're going to take. I'm not going to go through all the screenshots whatsoever, but I'm going to talk you through the process and for those that want more detail and/or want to see some of the screenshots, please use the DRGR user manual. So the five-step process is you're first going to select the activities you're going to want to include in the voucher. So not all activities, every time you do a voucher, is required to be part of it.

You know, you might only have items that you need to get vouchered for for your rehab program and your economic development program [inaudible] underneath that only through activities total. So you're going to select those activities and that's what's going to start the creation of your new voucher.

You're also going to select your fund type for each of those activities. Most of you are going to be working off your program or what's just called your grant funds. Some of you may actually end up having some program income and that's when you'll also have to choose for any program income. Then you're going to enter the drawdown amounts for each activity and fund type. So you might notice in both the first steps, I'm talking about activities. In the obligation, I was talking about activities as well. So it goes back to our action plan step, how important it is that you have mapped out and entered your activities correctly. It's also important and this is a great example of where some of those activity numbers could be very supportive for you.

I know some grantees even for their activity number that they've entered into the system, they'll talk to the subrecipient and say, City B, for your buyout program for low/mod, whenever you request a repayment for us, use this code number. That code number is also what's in your DRGR [inaudible]. It's an example of a way to use DRGR to support your efforts in processing and coding things. So again, a little bit of a connection back to the action plan out here for you on [inaudible] an activity number; but specifically a connection back to the action plan, because you're going to be drawing funds at the activity level. Enter the drawdown amounts [inaudible] and fund type. You're going to confirm this drawdown amount and then if you could go ahead and view that PDF [inaudible] finalize voucher.

And then the next step is someone else. The approver is going to go in and review and approve the voucher and that is automatically sent to the treasury.

Let me just stop for a second. There's two exceptions I want to talk through, is if you're a voucher approver, you are not required to approve that voucher. You can deny it or reject that voucher. So I say review and approve, but I want to honor that not necessarily are you always going to approve.

If you see an error, if you have the process where you're supposed to look at the backup documentation as well and you see there's not sufficient backup documentation, that's based on your grantees' plans, what do you need to process a voucher for? If you're not seeing that, you're entitled to and you should reject that. So let me say here, whatever your internal processes are for creating and approving a voucher, follow those.

And DRGR allows you to reject a voucher if it's not okay. It's going to go back to the create voucher and they're going to have to figure out and you're going to work together on what went wrong. So again, it's not automatically an approver, you're also allowed to reject if you do not want it to go to treasury.

The other exception to this is I say it automatically gets sent to treasury. That's almost always true. What HUD has done in the system is set up what's called a pre-defined threshold voucher amounts. And so if you have a voucher that meets or exceeds that voucher amount, then it actually doesn't go straight to the treasury, it's going to go to HUD and what you're going to see on that voucher is the status is going to say approved pending headquarters.

Right now, it's my understanding that it's about $5 million; is that correct, Ryan and Tyler? I think I caught them, I know they're on mute right now. So when they come back on, we'll have them double check, I think it's around $5 million. And basically, for NDR and you new DR grantees, HUD usually lets people know through the CPD reps as well as other publications what that threshold will be about and what you might need to do to provide them information in order to get that threshold voucher approved.

Ryan Flanery: That's correct. $5 million is correct, by the way, Janine.

Janine Cuneo: $5 million. Sorry, I forgot I was going to call on you a couple times.

Ryan Flanery: No. That's okay. I have two levels of mute. So it was taking a minute.

Janine Cuneo: No problem. So it's at $5 million now and again, keep your eyes out for that. And so if you're over that on one of your vouchers, it will not automatically go to treasury, but rather go to your headquarter rep and approve for pending headquarter. Another key thing, there's a lot of different items, you can cancel vouchers in here. So there's different things of vouchering that happens and that you can cancel them. I'm trying to think of some of the others.

There's a few others you can do in the system, but one that's really important at the beginner level is revising vouchers, because this does happen and it's happened for a whole host of reasons, from a billionaire to oh my God, this actually didn't meet an eligible activity or wait, this didn't meet the national objective, it's not an eligible cost anymore. And so you might've pulled down funds and drawdown funds and low and behold something has happened where it was incorrect.

And so what you're going to need to do in that process is to what's called revise a voucher. And you're able to revise a voucher [inaudible]. You're going to be moving money within the grant. When a new activity that you're moving the money to has enough funds to obligate, that new activity's status is underway and that no activities have been associated with revision can be blocked.

So let me help you think this through just for a couple of minutes. When you're revising a voucher in the system, and I show here one voucher, for example, that's from the City of Chicago and it was a drawdown amount for $50,000 and let's say of that $50,000, $20,000 was not correct for whatever reason, it was a billing error, ineligible activity, didn't meet a national objective. So you're needing to move that $20,000.

What's going to happen is in the system is you cannot put a negative amount in the system. So you can't literally write a voucher for negative. Rather, you're going to have to go in and revise the old voucher. So that $50,000 wasn't supposed to be $50,000, we are only supposed to request $30,000. So I need to take $20,000 of that voucher and move it. What you're going to want to do is move it to what you're going to be asking for for your next voucher.

So let's say I'm now ready to submit a new voucher for Activity B and I need $60,000 new. So instead of asking for the full $60,000, what I'm going to do is revise the City of Chicago $50,000 voucher. So I'm going to revise it, pull $20,000 off of it, move it to my city voucher and then by doing that, I'm not going to ask for the full $60,000 on that voucher, I'm only going to ask for $40,000. And what does that mean happens?

[inaudible] got paid for that $20,000 and [inaudible] the city's [inaudible]. Moving that money over and you're needing $60,000, HUD, [inaudible]. By the way, you already got overpaid once by $20,000. So I'm going to move that over to my $60,000 and now I'm asking for a new $40,000. So it's all happening within the same grant. For you beginners out there, [inaudible] look at the grantee manual and it really helps you walk through it. [inaudible] sometimes it takes a village. Get a [inaudible] fiscal [inaudible] get through and map it out and also, it --

Chantel Key: Hey Janine?

Janine Cuneo: Yeah.

Chantel Key: The last couple seconds the phone went out for a second. Do you mind repeating about the last 10 seconds of your presentation?

Janine Cuneo: Of course, Chantel. My apologies to everyone.

Chantel Key: Thank you.

Janine Cuneo: Mm-hmm. Thank you.

What I was trying to say is -- I'll go back a little bit -- when you are moving these monies, fiscal staff, grab a few of you when you're doing the revision for the first time. It can be a little complex. So grab a few of you and map it out outside of the system how you're going to do the revision. Look at the DRGR user manual as a guide and then if you're really having struggles, don't worry, don't go through the revision process, you can ask a question. DRGR, in the HUD Exchange, and I'm going to show you guys that during our live demo, you're able to ask questions.

And so a DRGR expert will be able to help and support you. So again, for the first time you're doing a revision, work as a team and if you're needing more time, then please feel free to stop and ask that question. I find once people do it once, twice it becomes very easy for them, they pick it up, but the first couples times is a little bit difficult.

Here's a revised voucher screen and what you're noticing here is we're looking at a line item, and again, we used an example of the Greater Denver Housing Help line item. When they drew down $25,000 and for whatever reason they're needing to revise that; that full $25,000 was not the correct amount and they need to move $5,000 off that. So it was only supposed to be a $20,000 revision. So they've got to now move $5,000 to a new activity and if only you move it to a new activity for what you need to get reimbursed.

So let's say that new activity, oh my God, $5,000 you need to get reimbursed by HUD for their acquisition rehab multifamily program -- which is called NSP1-B A/R and a lot more acronyms here -- so I'm going to move that over to $5,000. So now you choose the activity and then you also put the amount in.

You can split one voucher line item into multiple activities up to the total amount of the original draw. So sometimes if you have to move it around so that multiple revisions are happening, you can do that. You'll notice here there's also a dropdown called revision reason right underneath my red box here, that's a dropdown and what you're going to need to do for that is look at what it's having there, what is the reason for it and also, don't hesitate to put in a reviser comment there, both for your guys' staff internally -- I know some people have used that for that was part of journal entry 22/21 just so they have a record of what happened in their voucher and then any journal entries that might've happened. So you can use that comment box for your own notations as well as if you need to communicate something to HUD for that revision.

The last thing I'm going to talk about in drawdown is some of you may have program income for DR and NDR. And so I want to make sure that for those of you that have that, that you guys are aware of what's happening. So if you generate program income, you must track the sources and uses in DRGR, you must track it. Now, that doesn't mean there's going to be a monetary transaction exchange. Literally, you're not sending back dollars to HUD and they're sending you money, rather you're tracking it what you've done.

So in DRGR, you're going to manage the program income. You're going to request a drawdown and approve drawdown. Those are things, again, you're going to need to do in the vouchering process just like you would do with your program funds would do that with your program income. Again, no monetary transaction would happen. However, you are moving it back and forth.

You're also budgeting your program income at the action plan project and activity level. So when money comes in, what is it you're budgeting, what are you going to be using it for? You're going to be creating program income receipts and typically you do that against the activity that you generate with a PI. You're going to be drawing your program income on vouchers and you're going to do that against what you've expended the program income on.

Then there's an optional where you can create program income accounts and RLF or revolving loan fund accounts. There's much more detail [inaudible] going to go in here for our beginner, but I do want to make sure you guys know about these program income receipt vouchering and accounts and you require to track your DRGR in the sources and uses in DRGR as a requirements for program income.

We're going to go into QPRs next, quarterly performance reports. QPRs allow grantees to identify how you're doing, what's your story, what have you been doing and they're going to tell the story both by your milestones for financially, how you've achieved any national objectives through your activities. You're going to do it both in the narrative form, but also, you're going to do it by filling out all the different information you put in your activity how you met those proposed accomplishments.

The report, again, is based on your action plan set up. So you can not submit a QPR if you have changes to an action plan pending with HUD. So remember, I told you guys sometimes you go into your action plan you're going to have to make some changes. If you have an action plan that you've submitted to HUD and that's pending, you're not going to be able to submit your QPR.

So you want to make sure that you think about the timing of when you do any changes into the action plan and how it may affect your ability to meet the requirement in submitting your QPR on time. Another thing you also want to think about is making sure you're communicating with your HUD rep. So hey, HUD rep, I need to do an action plan change, would you have the ability to be able to review this in X amount of timeframe so that I also can get my QPR in on time? So make sure you're talking with your rep. Again, you're going to reporting your accomplishments for each quarter and then that's going to happen at a cumulative basis at the grant and activity level as well as the detailed what's happening per quarter. So again, you're going to identify your accomplishments once a national objective has been met.

You're going to be pulling financial data as entered into the drawdown module. So all the information that you did in the drawdown module that last quarter is going to be pulled into your QPR automatically and then you're going to want to provide narrative detail in the progress for the grant as a whole and then also, part of the activities that are salient to that quarter. I just want to stop and pause here for a second, Chantel, are we having any problems with my voice now? Is it coming across okay?

Chantel Key: Yes. It's fine.

Janine Cuneo: Great. Thanks. I just wanted to do a check-in. So again, keep your reporting on two levels, overall progress and then activity by activity. One thing to note when you're talking about the activities is some of the activities are going to automatically going to populate in the QPR, basically saying you must talk about these and that's when you have financial data that entered that quarter you put in obligations.

So if you did a draw on activity one, two and six, your QPR is automatically going to populate with activities one, two and six. Also, if you did any action plan data changes, so let's say in the last quarter you did changes to one, two and three, then it's going to automatically populate one, two and three of your activities.

That does not mean, though, that you can't talk about the other activities and I highly recommend that if you do not have any financial information happening at any of those activities over a couple quarters, you're going to want to include those in your QPR and talk about what's happening at your narrative level. You might have had a barrier; your environmental assessment is taking a little bit longer.

There could be reasons and rationale why there's not been financial information happening for the activity, but that doesn't mean it's not important to tell both your public as well as what's happening with that activity. So again, that determines by way of both your conversation with your rep, but also by way of if you haven't entered something for a few quarters on an activity, probably good to note that and think about what story am I telling HUD in the public and you want to make sure you're telling a robust story.

The grantee must include the activities where you need to also identify accomplishments. So once a national objective has been met, that is when you detail your accomplishments. So even though that activity might not automatically pull into your new financial data or action plan data changes, you will still want to pull that into your QPR and talk about those accomplishes being met and again, that happens once the national objective has been met. And then again, you have that narrative option of explaining the process.

And lastly, you're going to want to pull in for any expenditures that happened and that's going to be a manual entry, expenditures are. Again, some QPR deadlines that you're going to want to make sure you're on top of. Thirty days after the first full quarter the initial grant is signed is when your first QPR is due.

Then after that, these are going to be your grantee QPR submission deadlines. Make sure everyone, during that month, is really insuring that you got all the right information so you can [inaudible] QPR correctly, accurately and on time. So here's some basic steps to enter the data. First, you're going to do an overall progress narrative and also any additional matching funds you're going to want to talk about. It's what's happening at the high level.

And usually, to be honest with folks, during your first quarter, sometimes even your second quarter reporting you might not have a lot of activity information, because it's not going yet. So your progress narratives sometimes are a little bit more robust. And then the activity level information, once those really start gearing up, you'll be having a lot more information to add there.

So examples are narratives, you're going to be describing your progress, sometimes your lack of progress and what's going on there, if you have met a national objective for an address, you're going to be entering addresses, again, not every activity will have addresses, depending on the activity type, but if funds have been expended.

Again, most of your financials, except for expenditures, is automatically pulled into the system. Any match contribution, the direct benefit, again, if they have met that national objective, whom have you served, the FHEO information that's required to collect, the housing unit that's required to collect and then if it's an area benefit, you're not reporting on any data, for example, the FHEO data at the QPR level, but you will still be doing any of your accomplishments.

And so for example, the number of jobs you created, the number of pipeline you constructed if it's an infrastructure, for example and those accomplishments -- remember, the availability of those accomplishments in the QPR may depend on what you put in your proposed action plan. So you want to make sure that if you proposed something in your action plan, you want to talk about how you're accomplishing that, but you also want to make sure if there's something that you're not seeing here, we've done that, we want to talk about that and you're not seeing it in your QPR, go back to your action plan and see if that's an option that you can choose. It is not an option -- you can still talk about that and you can talk about that in your narrative then.

So don't forget, if some of those accomplishments that are pre-populated by HUD aren't exactly what you're wanting, for whatever reason, for example, you want to talk about jobs created, but you want to talk specifically about certain jobs that you have promised the public that you're going to create and that just is not an option in the pre-populated lists of accomplishments, you can still talk about it. Talk about it in your narrative then.

A little quick tip here. For direct benefit reporting, enter only for the quarter for which you are reporting. So it's not a cumulative, but a quarter in which you're reporting, you're going to talk about what you have accomplished, not cumulative. DRGR will calculate the cumulative totals for you. One thing about that too, some people get little hiccups with that or some people sometimes maybe reported on something and they shouldn't have.

There is something called prior period corrections. Again, that's a little bit more intermediate and advanced. So I'm not going to go into the details. I want you to know that if you accidentally made an error and/or you did cumulative numbers or you made an error on what you reported on a previous QPR, you don't go back to that QPR, but rather on the current QPR, you make what's called a prior period collection. The user manual not just goes into depth about it, but there's also a little Excel template that can even help you with it.

This is an example, again, where you're probably going to want to map out how you do it before you go into the system. Here's an example, it's one screen, one activity type and it's for direct benefit. So again, every screen is going to look a little bit different by way if it's a direct or area benefit.

It will also look different by way of which activity type you have. So lots of differences will show up based on those varieties, I've given one example. And this is an example for a performance report for a direct benefit where if you, for example, accomplished, you've met a national objective on a certain number of households, then you're going to put that information in and you'll be able to select on the type of race.

Also, on the income levels, if you said this was going not be a low LM project, then you're going to be able to put how many low and moderate households you have met. [inaudible] one of your cumulative totals. You see this little red box here, this little cumulative total tab, that's going to be able to pull out to you and say, this is what you've said in the past, these are your cumulative totals in the past.

So you can always look at it that way. Another way to get at your view cumulative totals will be in the report functionality and I'm going to show you guys that at the end. Here's more of that QPR screen for direct benefits. Here's all the actual, again, not proposed, accomplishments that you had put in here that you've met, just a variety of different examples of something that a grantee will get and say, these are the things that we're going to be proposing we're going to need.

For when we're trying to do rehab, we're going to work hard at replacing those hot water heaters or we're going to want to make sure we do Energy Star replacement windows. And so already has met its national accomplishments, not just you want to talk about the actual total of properties, but if you put in your proposed that you're going to -- you know, for every one property you're going to have three windows that you're going to have an Energy Star, for example, you're going to want to include that.

So again, for folks that are filling out the activities at the action plan, it is not just a data person that should be filling it out or fiscal person or a program person, you're going to want to work together. So program people, what is it that you're proposing that you're going to do, fiscal people, what is the kind of financials that you need to put in place? Both of you guys, what are the kind of titles and numbering system that you want to put in place to support your efforts? Here at the bottom is another example of where how many total single family and then total how many housing units are you needing?

And I want to put this out there. If you did not select single family in the action plan, then at the QPR, it's not going to give you that single family line item. So you're never going to be able to tell your public how many single family.

You're going to tell them how many housing units, but not single family. So important that you're consistently thinking about every sub accomplishment at the action plan so that it shows up in the QPR level. Time for another poll, a little quiz for folks. So everyone put on your thinking caps.

And Chantel, can you do the quiz for us?

Chantel Key: Okay. We have another true or false question. Once you've entered in data on a QPR, it cannot be corrected in future QPRs, is this true or is this false? The polls are now open. And we have about 55 percent voted so far. So I'll keep it open for a few more moments. We have 13 percent voted true and 87 percent voted false.

Janine Cuneo: So once you've entered in data on a QPR, it cannot be corrected in future QPRs. Actually, it's true, meaning you can't go back to that QPR where you've entered that data incorrectly, but you can correct that information in future QPRs. How do you do that? Prior period correction.

Again, we didn't go into the details of that and the reason I put this as a poll is I wanted people to walk away knowing I can do this, I might not know how, I've got to go to the user manual, I might need to ask for support and help via the HUD Exchange, but if you made an error in the past that you're realizing today, maybe it's two quarters ago, you can correct it on today's QPR and that's by doing a prior period correction.

And so again, what we're going to have you guys do after this is I want you to know that if you've made a pass error in QPR, you can correct that today doing a prior period correction and that you're going to go through the user manual, look for prior period correction for QPRs and you're going to walk yourself through that. Last we have is reporting. I'm going to go through this quickly.

I'm going to do a quick live demo. And again, reporting is optional module and again, everyone sees a little bit something different in the report based on the type of account or user role you have. And the idea here is it allows you to look at data very quickly. You can move and sort the data, you can filter the data, etc. And some here are popular reports.

There's tons of reports in there and there's some popular reports that just for you beginners out there, administrative reports or what's called admin04b, it gives you some user information, financial reports or Fin reports 04b and 7b, and I'm going to show you 7b, and then there's also called Perf or Performance Reports that's going to show you beneficiary information. I'm going to go ahead and do a live demo now, give me one second while I pull that up. Chantel, can you confirm that we're seeing the HUD Exchange right now?

Chantel Key: Yes. We are.

Janine Cuneo: Great. So as of right now, I'm in the HUD Exchange, I'm on the DRGR page. You can get there by going to the manage a program and look for DRGR or you can do a quick search HUD for DRGR and this is the main page. Right here the view DRGR guides, tools and webinars, to get to that, that's where you're going to find your user guide, very important. You might recall I also talked about different releases. Again, the system is constantly updating itself.

So here's all the different release information that happens. So just to get yourself a little used to it, here's also the log-in screen. So I'm going to go ahead and log myself in. And I've read these terms and services quite a bit. So I'm going to go ahead and click yes, but please make sure you read them, especially for you newbies and you'll see the screens, I've shown you these screenshots before.

I'm going over the reports module. Automatically it opens up a new page called MicroStrategy. So I go back to this, I can see my DRGR, but micro strategies is a new one and I'm going to have you guys -- I'm going to process this very quickly due to time right now, but you go through the process. Again, you're going to see it on the screenshots when you look at the screens after this presentation. I'm going to go down to 7b and I just want to show you a couple of salient things. Again, everyone sees something a little different. So I have a little bit of a different access than many of you might have, but I'm just going to use one grantee as an example.

And here is what we have as what's called page-by and usually this automatically comes up. If it doesn't come up, you can go to the tools up here on the left-hand side and make sure you check page-by and to me, this is the key. Page-by allows me to do different filters, it allows me to move my columns around, it allows me to see what I need to see per each report, because these reports have a lot of information. And so sometimes you only need to see certain things.

So let me give an example here. Let's say I'm working for this grantee and I'm learning for their disaster recovery, because I want to look up a specific responsible organization, meaning I want to know all the information that we put into DRGR and I want to figure out some financial information around the responsible organization. So one way to do that is I can do an export of all this information.

Again, I want to make sure I have the right grant number. So this is -- again, I want it for Grant B-05-DJ for our example and let's say I can go ahead and export this. There's two ways to export, one is up here, it's called Excel and then one is the PDF, two ways. I usually do Excel, because I want to manipulate some of the data.

So one way is you can just export it like you want, go into Excel and manipulate the data. And let's say I want all information on San Jose, the responsible organization, the local government municipality of San Jose, I can go to export the 6L and do it there. Another way you can do it is actually within the report module and you can move the columns around. So one way to move the columns is you go ahead and left-click on what you're wanting in responsible organization and I'm going to move it, you're seeing this yellow line happen. I'm moving it up to the page-by.

Let me go ahead and go that and show you what happens. So now what happens is I have another way in which to filter my report. So it's going to give me all the information, all the responsible organizations that would be part of this and I'm like, maybe what I wanted is Salinas. So I want all the data information on Salinas and what I have is one activity, I'm able to see here that we've dispersed $377,164.35 out of this activity, it's all program funds, there's been no program income and that we have a budget, though, of $400,000 for that activity.

If I want to try something else, if I want to see all the activity for another responsible organization, Las Piedras, I'm able to see the same thing here. So again, it's a different activity, this one has the $220,000 budget and I notice we've dispersed $219,000 of that $220,000.

So that is one way in which if you're wanting to get more information, I'm going to pull that responsible organization back down. Let's say you're wanting it on activity type, you specifically want to see all the activity types that are specific to construction of new replacement housing. I went ahead and pulled that activity type out of the report, put it in the page-by and now I can do that here and I'm able to now see every activity type, there's two of them, that are around new replacement housing.

I'm showing you guys this because I want you guys to know that you can do so much information with this report, but it's up to you. It's an optional, it's up to you to utilize. I have found it's useful for a lot of program staff when they're having to relay information in a quick, easy, digestible way to their superiors. So I'm going to go talk to folks from San Jose tomorrow, can you give me a quick read on what's happening with that activity?

And so you're able to say, we've dispersed X amount of dollars to them, this is the type of activities they have, they're doing the new replacement housing for $800,000 and we've dispersed $799,000 to them or whatever the details are, you're able to do a quick read on that. So it's good for both reporting, but there's also examples here on vouchers and I find it very helpful for fiscal staff. It's a great easy way for you to look through all of your vouchers.

I'm going to go ahead and stop, but before I do, I'm going to log out. Remember, you've got to log out of DRGR. I'm going to go back to my demo. So excuse me while I go back. And you'll see here, I talked a little bit of how you access the reports. So if you follow these steps, you'll get to the reports. And then lastly, I want to go over one quick thing called data upload and this is something HUD has provided to you.

I find them miraculous for you big grantees out there. And you'll find this on the HUD Exchange under data upload templates tab and what they allow you to do is they allow you to upload information into the system in a quick, easy way. It doesn't mean you still don't have to do work to fill out the data, but it allows you to do it in an Excel document, for example and it tells you the exact fields you need to fill out. So I know a lot of times people, for example, might've had a big rehab reconstruction of 30 single family units and you need to enter in all 30 of those addresses when it hits the national objective that quarter. Well, to do that manually by DRGR can sometimes be time consuming.

You might want to think about looking at the data upload and say, I have most of this already in my Excel, let me transfer this over, fill out all the information that's needed in the data upload and I can upload it once and get it into the system instead of doing manual entry by DRGR. It's a little bit more advanced out there, but I wanted to make sure you guys knew about these, because they could be lifesavers, especially once you get used to the system.

So I know I've talked a lot at you and I think it's time for us to take some of our questions. We might not get through them all, but our hope is to and if we do not, we'll make sure we work with HUD to figure out how we can get and answer all of your guys's questions. Tennille, can we start with some of those questions? I'm sorry, not Tennille, excuse me, Chantel.

Chantel Key: Yes. Our first question today is, "The IDIS account lookup functionality for creating DRGR users is still not working; is this correct?"

Janine Cuneo: I'm going to actually ask Tyler or Ryan to answer that. I don't know the day to day of that.

Ryan Flanery: That is correct, yes. It's not working right now, but there's actually a ticket for correction in our next release, which we're going to start working on in the next, hopefully couple of months here. So not currently working, but will be in the future.

Janine Cuneo: Great. Thanks so much. Let's go ahead on the next question.

Chantel Key: Okay. "The TA and monitoring events loaded are not currently showing in the QPR."

Janine Cuneo: I'm going to do my best to diagnosis this. It could be a couple of reasons and also dependent on exactly what you mean by this. So I'm going to do my best. All TA, monitoring and auditing events, those happen -- you actually enter the data in your admin module. So you would go in and put the event down as well as any of your findings, concerns on what happened, because that's where you actually get [inaudible] information. Where that information is going to show up is at the QPR if you did work that quarter. So if you have entered stuff in that quarter, then you should have something on your QPR and it should be a little screenshot. I think I showed you one of those today, a little -- it should be in your QPR screenshot.

And so what I want you to do is go back and double check that when you're talking about your TA, monitoring and audit events, that you have put the information in in that admin module. If you have in your QPR you're not seeing that little screen, please put a ticket in to the HUD Exchange under ask-a-question, you can go through the process, put a ticket in and [inaudible]. You know, I think you're allowed to upload documents, upload your QPR and say, I'm not seeing this anymore, I cannot find events. I have put stuff in at the admin module this quarter and it's not coming up. And then hopefully HUD can see if they can diagnose that, because that seems like not a common occurrence. Usually I've always seen this show up. So it might be something specifically a glitch here about yours, but make sure you put it in the admin module, that's where you put the information in.

And what happens at the QPR, it just automatically pulls the information and shows a little table about what's happened, it doesn't go into detail. Tyler and Ryan, have you seen anybody say they've put stuff in the admin module, but yet it's not showing up in the QPR that you're aware of?

Ryan Flanery: This is Ryan. You go ahead, Tyler, you would know more than I would with this stuff.

Tyler Bridges: Yeah. It is a known issue that the amounts in this quarter are not appearing correctly. I believe it's the cumulative [inaudible] stuff. So it's a known issue and I think that we're going to try to fix it in the next one or two releases.

Ryan Flanery: So I'll just add to that in saying that it's a big complex system. There are -- the majority of these things that we see recurring that happen that are glitches or that things aren't displaying, they usually are relatively minor and superficial. So we have to go on a regular release schedule based on our funding sources that allow us to make those fixes.

So if you're new to this, it's like anything. You get a cell phone and sometimes the operating system has to be updated every so often to deal with certain things. You know, it's along those lines. So you may hear us say that it's a known issue, that it's something that we've identified or that's been reported to us and it's going to be fixed in an upcoming release. So just to put it in perspective, some of the jargon that we might use, you might hear that in the future.

Janine Cuneo: And sometimes when you have those little glitches, it's important not to get too worried, you can always put in your narratives that we entered stuff into our admin module [inaudible] happy to [inaudible] have any specific questions. So honoring -- you know, you did some work and it's just not showing up in the QPR and [inaudible] hesitate to use the narrative boxes if you want to explain more things too if there's ever any glitches like this.

Ryan Flanery: Right. And Janine gave good guidance earlier in that if you do encounter issues like this, like you entered information, it's not showing up in the QPR or something is not progressing right and the screen is getting an error message, and you don't know why, and you think it may be a system issue, go to the HUD Exchange and submit a Q on that. That comes to our TA providers that work very closely with us and we work very closely with the developers to dissect and address those issues and sometimes there are workarounds that we will come up with that help you get through until the next release comes out, that something is recurring or causing an issue.

Janine Cuneo: Great. Go to the next question, Chantel.

Chantel Key: Okay. The next question is about copying and pasting information into the action plan. "Is there a certain font that should be used or anything to not create additional characters?"

Janine Cuneo: So it's a great question. I've never seen any recommendations of a font or anything like that. What I have seen, though, is sometimes when you cut and paste, things get a little off. I'm not even sure how to quote that.

Sometimes there's extra characters that get added into it when you cut and paste into DRGR and sometimes, by the way, you don't even see those [inaudible] are looking at the PDF version, for example versus what you see on the screen. And so one way to get around that is to [inaudible] document. Now, it usually transfers into .txt and that literally means when you're saving a word document, when you save it, [inaudible] saving as Word, go in and save it as .txt and then use that version of .txt and cut and paste. Tyler and Ryan, have you guys given any other guidance behind that or seen any other weird things that happen when we copy and paste information into DRGR?

Ryan Flanery: Well, no, but you cut out on, I think, the first option. So let me just restate what the options are and what the guidance is here. If you copy and paste out of Word or some other word processing program that already has embedded formatting, then what's going to happen is as you transfer that over into DRGR, which also has its own version of embedded formatting, it's going to pick it up as characters that are going to look kind of weird.

So what you want to do is you want to make sure that you either copy and paste it into Notepad first, which really just strips out the formatting that was in Word or WordPad or something in Apple software, but then you copy and paste from that document into DRGR. The alternative is to save it as the part that we did here, Janine was that you could save that Word document as a .txt as opposed to a .doc or whatever the extension would be.

So it's just save as and then .txt and that should strip out the formatting to the point where it won't carry over into DRGR.

Janine Cuneo: Right. [inaudible]

Chantel Key: Okay. "Is there a standard" -- sure. "Is there a standard" --

Janine Cuneo: Oh, sorry, go ahead.

Ryan Flanery: -- "is there a standard template of projects and activities?"

Janine Cuneo: No. There is no standardization of projects and activities, because every one of you are unique grantees. So unfortunately, there's no standardization of that, because you guys are really all unique. And so it's your story you're telling in the system. However, that being said, to give some advice is you are then working off your published plan. Remember, your DRGR action plan mimics [inaudible] detail. So again, your DRGR action plan mimics your public plan, but goes to more detail.

So for example, if your published plan says you're going to do economic development and infrastructure work, then those would be probably most likely your two projects and then your activities that you're going to create are very dependent on how you're going to be running your program, meaning are you going to have multiple counties you're going to be working with that are going to be your responsible organization, are you going to have multiple national objectives you're going to be meeting, how many multifamily complexes are you going to be meeting? So there's no standardization of it.

Tyler Bridges: In terms of minimum criteria for projects and activities, you can use the data uploads as a resource.

Janine Cuneo: Great point. So again, that data upload [inaudible] how many projects or how to translate your published plan into it, but what it will tell you are one of the various components of a project and an activity that you must fill out when you're doing DRGR. And you can even fill it out as a data upload and upload it into the system instead of manually entering it into DRGR line item by line item. Let's go to the next question.

Chantel Key: "What level do you need for all of the arrows to show up using page-by?"

Janine Cuneo: That's an interesting question. I've been under the impression that any user that has access to DRGR will have access to the reports functionality and then also at the reports functionality would have access to page-by inclusive of all the different arrows. So the information of each report might change by the way of who you are as a user, but the actual functionality of the system, meaning being able to -- as you guys saw me, I moved around the national objective up and down on page-by, that functionality doesn't change by user. So you should be able to move things around regardless. The information you're seeing, though, may be different based on the user type. So I think MicroStrategy itself is the same functionality. Tyler or Ryan, have you guys experienced that in a different way, though?

Ryan Flanery: I mean, it may depend on the browser that you're using. Sometimes if you're using a browser other than Internet Explorer with the compatibility view mode turned on, then you may not see all of the little functionality that's in MicroStrategy. In the drop-down menus, you can select to have those page-by buttons visible.

So if they were visible at one point and time and they're no longer visible and you've been using the same browser, you may want to look within -- and I forget which of the -- Tyler might remember, but I forget which drop-down menu it is that can get you to that, maybe tools. But then you could just reselect page-by and that would make them visible again. But without knowing exactly some of the details involved in this question, it's hard to say, but to answer the question, no, it doesn't go by the user type or role.

Anybody who has access to MicroStrategy should be able to see all of those buttons in that functionality. The only folks who get any additional functionality are what are called super users at headquarters and there are only a handful, but everybody else has the same functionality.

Janine Cuneo: Great. Thank you.

Chantel Key: "Well, so you know browsers. Do you guys recommend Internet Explorer or any other specific ones?"

Janine Cuneo: It's a great question. I know some people will say they use other browsers, [inaudible]. We don't recommend it and no holds barred, if you go into another browser, I have personally seen errors, I have problems saving, I have occasionally accidentally done it -- you know, I just forget it and I use my other browser and things don't save on me. I put a lot of time and effort into something, just not -- there are just a lot of glitches with other browsers.

So I really highly recommend Internet Explorer and specifically, the compatibility view. And again, if you're not familiar with how to do compatibility view, the DRGR user guide, which I'm going to go ahead and change my screen and show you guys the other resources page, that guide you're going to want to utilize for how to get yourself to compatibility view, it helps you there. So IE, Internet Explorer and more specifically, compatibility view is the safest best for yourself.

Chantel Key: Okay. Our next question is, "How we can insure quality of the upload when we use the templates?"

Janine Cuneo: That is two-fold, but I'm going to also ping Tyler and Ryan too. So one thing is always whenever you're doing anything to [inaudible] yourself and the quality assurance is double, triple, quadruple checking what you're doing. So when you're using the upload, double checking that you know and you understand enough around what the title is of each column so that you're absolutely putting in the information. I found some people go straight to the data upload and don't know enough about DRGR. And so they're not actually understanding what a title is of the column.

So you've got to know enough about DRGR to utilize the data upload. So I especially tell people grab a friend, grab a [inaudible]. That's one thing on your end that you could do for [inaudible] to want to [inaudible] and making sure it works in the system. I'm going to ask Tyler and Ryan if you guys have had any glitches that have happened, you've seen any places where you'd recommend X, Y and Z for a user when they're doing the uploads.

Ryan Flanery: Well, I guess in terms of insuring the quality of the upload, what I can say is that the uploads are very finicky and to the extent that you're putting in information that is -- if it's not perfect, the entire upload doesn't take. So if you have the wrong column header, if you have a character wrong in a column header, for example, there are a lot of ways that you can use an upload and the entire upload will come back saying that it didn't take.

So that's one process that's built in to make sure that the data you are uploading is the appropriate data by the date of point for element within the system. Another recommendation I would have, though, if you want to do some manual QA is once you upload the data, it'll give you a report that says, everything's been uploaded properly, but then what you will want to do is go back into the system, and this is where MicroStrategy is so helpful, go into MicroStrategy and run a report or reports that will get you the information that you need and then just do a cross reference.

And sometimes if it's financial, you can do spot checks with the sub totals and then the totals to make sure that everything worked out. If it's performance, then you might have to get a little bit more granular looking at the cross reference between your data and what the system has, but I think from a process standpoint, that would be helpful. Again, I don't know the entire context of the question, but hopefully those are some of the issues that the person asking this question was concerned about.

Janine Cuneo: Great. Thank you. The next question, Chantel.

Chantel Key: "How can you change your action plan project?"

Janine Cuneo: Oh, okay. So as I mentioned before, the different [inaudible] of your action plan -- you know, once you've submitted it for the first time, again, you submit it to HUD, it comes back to you what's called -- it's going to be in the status as submitted and approved. A variety of different reasons could happen and if you need to change it, then you're going to go back into [inaudible] module.

My best advice is search on the project. Remember, your left-hand side of DRGR is your module navigation panel and you are going to have options there to search projects. So you can go ahead and search the projects, find the project that you want based on your search, you'll go into the project screen and you can make changes and edit right on that project screen.

There's one great way of making an edit into your action plan, both projects [inaudible] will happen at an activity. If, for example, you are increasing the budget of one of your activities or decreasing the budget of one of your activities, the same thing you would do is you'd go into your action plan module, on the left-hand side is where I'd recommend you to search an activity, find that in your module navigation when you search an activity and then you can go ahead and once you find that activity under your search, pull it up and find within the activity screen [inaudible] by that. Most likely that will make it change your action plan status and that will mean that you have it now called a revised action plan status and you'll need to resubmit that to HUD. I recommend, especially for the big grantees out there, sometimes you're going to do changes and you might have a [inaudible].

That might mean you have five or 10 changes that are going to happen for you within a week or two. You might want to think about not submitting that change to your rep one by one by one. I would really recommend you group all the changes as best as you can and do one submission. So make all the changes you would need, if it's three activities, two projects, etc., make those changes and then resubmit.

And that reason is two-fold. One is it's just a little bit easier in you getting it all done at one place, it's a lot easier on your rep as well, but also, the other thing you need to remember is once you submit an action plan to HUD, to revise that action plan and resubmit you have to wait until they approve it. It comes back to you, meaning it's now approved, HUD has approved it, it's no longer for them to review, and it’s come back to you. Only until its come back to you then can you do another revision and resubmit.

So you really need to make sure you're thinking about that sequencing, I started the entire webinar on sequencing. You're going to want to think through the sequencing so that if you have 10 corrections you need to make in the system, and you do it one by one, and you correct it, and you submit it to HUD, and it comes back, you resubmit, you're going to have to wait for the information to go to HUD, reviewed and come back to you, HUD, reviewed, come back to you.

And so instead of making that happen, I recommend doing it once. Also, if you might remember is if your action plan is not in that approved status, if it's still being reviewed by HUD, then you're not going to be able to submit your QPRs and you might then have a late QPR. So again, you're going to want to think about not just how you change your action plan, meaning go search for the action plan project or activity and then make any changes to elements you want, not just when you do it, but also when you submit it so that it doesn't interrupt with other things like a QPR submission.

So I'm looking and it appears that we were able to get through, I think, almost all, if not all the questions. If there's anything outstanding, we'll go ahead and see what we could do to directly connect with folks. Other than that, I've put up here some of the other resources. So the webinar series, again, I know we touched on no policy today. So if you're wondering what a national objective is, if you're wondering when I say things like a published plan, those are things you're going to want to go and get yourself educated on those through this webinar series and then there's a lot of information on DRGR. Again, I know I'm over touting this DRGR manual, but A, it's from 2016, so it's very up-to-date and B, it's just really strong and it really helps both if you're a CPD rep on the HUD side or if you're a grantee.

It goes through, it gives you screenshots, tells you [inaudible] something and how to do it. So become friends with that manual. Chantel, is there anything else we need to do before we close out?

Chantel Key: No. That's it.

Janine Cuneo: Great. Well, thank you, Tyler and Ryan, also for joining us today. And good luck and don't hesitate to ask a question through the HUD Exchange to anybody struggling out there, please ask. It's better to ask than be feeling like you're struggling alone. And good luck with everyone when you're setting up your action plans in DRGR for your new grantees. Have a good afternoon.

Ryan Flanery: Thank you, all.

(END)