

## **DRGR Release 7.7 and Recent Updates for NSP Webinar 11/12/13**

Vincent Grady: Welcome to today's NSP webinar on the DRGR Release 7.7 and recent updates. We are joined by members from HUD, Ryan Flanery, Jim Yerdon, John Laswick and we also have Janine Cuneo on the line who will be giving today's presentation.

I just wanted to go over how to ask a question really quick. So if you're listening via VOIP, which is through your computer mike and speakers you can ask a question into the Q&A box at any time and we'll be going over questions at the end. If you did join us on your telephone you can ask a question audibly. If you just raise your hand we'll go through and unmute your line and you can ask your question verbally to the panel.

So at this time I will turn it over to Janine Cuneo.

Janine Cuneo: Thanks so much, Vinnie. And again, we have both Ryan Flanery and Jim Yerdon here on the call. So you guys may be hearing their voices in and out throughout this presentation as well as during the Q&A. We will be holding a Q&A at the end. Don't hesitate to go ahead and follow Vinnie's instructions on how to ask a question, enter those questions whenever during the broadcast and we'll get to those at the end.

I will also have John Laswick here for any calls for your overlapping questions we need to answer that way. For folks that are very familiar with DRGR you understand that we often are working through releases that happen throughout the year and the most recent has been as of October, 2013 called Release 7.7. This release included multiple different functionalities, post-closeout functionalities.

So we're adding and editing address information easily. Long-term affordability data reporting is now accessible and available in the system. New data upload features for vouchers and GPRs. This will allow you to quickly and accurately update DRGR, literally uploading information into the system and not having to go activity by activity to physically type in information as well as HUD is providing templates for that uploading in order to make that a bit easier for folks.

There is also two other types of information that happen during this period. I'll very briefly talk about that. We're really going to be focusing more on the uploading information and post-closeout functionality. There are only two places to get this information from HUD on the 7.7 release and other corresponding DRGR. One way is to go into the HUD.gov and there's a link right there on the What's New section. You might find it under the DRGR page.

Another way is to actually go to OneCPD Resource Exchange. And Vinnie, can you do me a favor and go ahead and get me over to the website of that resource exchange? Great. What you guys see here now on the screen is the OneCPD Resource Exchange. You'll see that it's at OneCPD.info, quite an easy URL to know. And on this page this has everything to do with OneCPD.

It's a website that's been available maybe now about a year and most of the information on NSP has been redirected over to this website. It should be a one-stop shop for folks. I wanted to show you guys just to show you exactly how to get to the DRGR Release 7.7 fact sheet so you guys can see that information as well as just a quick tutorial.

A lot of places you'll find things is under the resource library. You can both click on the resource library on the scroll bar up here or go ahead and you can also scroll down and you'll see resource library. Under that you'll see different curated pages for each type of either a program, for example, the CDBG-DR. So you'll see or you also will find different type of pages on either a system or an activity or special issues, like Affordable Care Act. So go ahead and go to DRGR. You'll notice under this it gives you information on both how to log in in special information around registration.

It gives you information about how to access the help desk on the right-hand side. In the middle here it also talks about the DRGR guides, tools and webinars that you can access and usually we will have some information about whatever is the most current information on DRGR. And as we talked about here, DRGR released 7.7. Scroll down a little bit further and you'll be able to get information on resources, news, FAQs, calendar information and courses all on the OneCPD Resource Exchange [inaudible] DRGR.

Scroll back up here and you'll see that DRGR released 7.7. There are four specific fact sheets that came out around this release. We're going to be talking about the first two that's post-closeout reporting for NSP and the DRGR's data upload. The second two have a little bit more to do with CDBG-DR, the tracking expenditure deadlines that's specifically around CDBG-DR and the most recent appropriation for the Sandy disaster, for example. And then the subordinate grantee data entry, that really is more the CDBG-DR tool that grantees may use.

I'll touch on that very quickly, though regarding the large grantees, like a state that might want to use that. Vinnie, can we go ahead and go back to the slide? Great. So I'm going to go ahead and talk about post-closeout reporting. Three major areas that happened during the most recent release was be able to manage address across QPRs, entering support data on QPR addresses and changing report cycles for grants close so that if you have any active program income you'll still have some reporting requirements.

And DRGR now allows HUD to change the reporting cycle so that you are now reporting on active programs and you're not having to provide quarterly reports once your grant has closed out. I'll talk a little bit about the address data that now you're not able to work within the system, a lot easier, in my opinion. I was really happy to see this being part of the updates.

I know how they're trying very hard to figure out how to make this work for new guys out there that are needing a simpler, easier, faster way of working through the address data as well as any issues that happen during the early months, even early year of the NSP grant where duplicate addresses were entered or any other access issues were happening with the addresses. You're really now able to go in there and maintain these addresses in a comprehensive way, including where you can use duplicate addresses in, I think, a very quick, easy way.

You're able to do this per individual QPRs or across all grant QPRs. So it doesn't matter, for example, if you entered this data a long time ago and/or you did it over multiple QPRs. For example, you put multiple data in there, the address incorrectly. You're going to both enter in the individual QPRs or you can list the information across all the QPRs. So here's an example on the screen you have under maintain addresses across QPRs.

Sorry, I'm going to go back one second. I wanted to show people how to get there. I was [inaudible] told to understand how to get to the different, new functionality in the system. In DRGR when you're looking at the screen and you see on the top row there's an admin or an action plan drawdown QPR all those different boxes that you can click on in order to get to the different modules of DRGR.

One of them is the QPRs. You're going to go ahead and hit that QPR module. The first thing you'll see is if you have multiple grants you're going to go into the different grant number under your add/edit QPR screen or you'll go ahead into the add/edit QPR screen for the grant number that you want. Once you get into there you'll see the window pop up. Many of you don't just have two QPRs like it has in this screen shot. Rather, there's many, many QPRs that you've done in the past.

Up here, though, the top part of the screen you'll see there's a new link called maintain addresses. That's what you're going to want to click on in order for you to do any type of removing duplicate addresses or improving accuracy and be able to maintain addresses. Click on maintain addresses. By doing that you're going to get the next screen shot we see here and this is, again, for one grant number.

You're able to, like you are with so much functionality in DRGR, do any type of searches that you want. So if you're just wanting to look at all the addresses by a certain grantee activity number or specific responsible organization, then you can make that search. If you don't, just like anything else, you can go ahead and hit search with all the blank fields and you'll get all the information provided. Here's an example of what one might see. We just grabbed a grantee and you'll be able to see things by both the activity numbers and the activity titles.

You'll be able to figure out and tell if it's been validated or not by evaluating these little yellow triangles or, there's an example here, we have 100 percent validation on one grantee's address. You'll notice across the bottom there's now all these different type of buttons you're able to push in order to make changes to that information. One, you could add addresses, you can edit an address, you can validate a selection.

So for example, if you select any of these boxes on the left-hand side next to the grantee's address you're able to then validate that. You can delete any of that has been selected and you can also move any of that stuff into different activity numbers, activity types -- excuse me, activity numbers.

So again, you have a maintain address screen now that goes across all QPRs. You're really going to be able to evaluate what's in there, you're going to be able to edit it all on this one-stop shop screens, validate and you're also going to be able to delete selected.

For those that have a lot of addresses in there, a lot of information, you might want to think about not looking at the entire grant at once. You might want to chunk this out a little bit, even by responsible organization, by grantee activity number. Some of you in states may even want to chunk this out by city, for example. So think of different ways if you have a lot of information in there how you use this search functionality in order for you to be able to view all the information you see, but not get overwhelmed, as some of you as grantees have a lot of addresses in there at this point.

Here's another example of we just want to show you how to edit an address. It's quite easy in a lot of different ways. For example, you go ahead and hit the edit address screen of what you selected and by doing so there's a pop-up window. You're able to enter different information as needed and then you'll go ahead and save that address. So quite a simple, easy process. Most of these buttons below, if you're going to add an address, edit an address, etc. will have these little pop-ups that you're going to be able to view the information in more detail and then be able to make any edits needed.

This has a little bit about supporting data. There are going to be some addresses that need additional support data, for example, on affordability. And you might want to be entering those in the QPR that has already been approved. For example, if you had an address [inaudible] and you need to enter additional information about the affordability period because this wasn't available to you at that time, it was not available to add affordability data at the time you entered the addresses into the system, maybe it wasn't there, then you can add this information.

You're going to be able to look very quickly into this maintain address system and add that information as well. You'll especially notice here that just because you entered an address in a QPR, for example, a year ago or two years ago it doesn't mean that you're off the hook and you don't have to add affordability data at that address requirement. I want to make that clear. Just because you added an address prior to the system allowing you to add affordability doesn't just get you off the hook.

You're going to have to go back, open these addresses up and enter that data information there. Okay. How you do it is we're on the maintain address screen again, you'll note, and on the right-hand side you not only can view [inaudible] on that address or view a map on the address, but you can also now enter data on that address. You'll be able to use that tool. Once you hit that enter data you'll be given different information that you'll be required to enter. So I always say to people, double-check you're on the right grant number and maybe you guys are going to have addresses around the different grant numbers.

You're going to have to deviate from some grants, because it shouldn't have been entered in that grant. So keep your eye on these grant numbers. Many of you have multiple grants in the system. But some information you'll need to be entering is property status, affordability start date, end date, description of that affordability method, activity type for end use, national objective for end use, some description of end use and total expenditure amount.

My recommendation for most people is open up the screen when you are taking some time and really look to make sure you know all the different elements that are going to be required in the system for you to put in and make sure you have that so you're able to collect all that information and you don't have to go back and request information if you missed one of the data sets you needed. For example, a national objective for end use. It's required. So make sure you get that and collect that information.

Ryan Flanery: And Janine, this is Ryan. We are also currently testing the data upload for the post-closeout screens. So we're hoping that by mid-December that folks should be able to just upload all of these data elements by address, by activity number. So they won't have to go into each and every address they've entered to edit that data. So hopefully they can do it in one self-swoop with the data upload.

Janine Cuneo: Great. And you said that you were hoping that's going to be mid-December; is that correct?

Ryan Flanery: Right.

Janine Cuneo: Great. We're going to be talking a little bit more about data uploads today as well. So we'll be able to show you guys how do you get the data upload screen. Recently -- Ryan's talking about an additional data upload type that someone will be able to use. So you won't be able to literally see that as an example here today, but keep your eyes out for that. I'm assuming there'll be some type of notification as well. So keep your eyes out for that. It sounds like that will be a great tool now for people that want to do an easy, quick upload from an Excel type document.

Again, we're going to go over how to do data uploads. So keep your eyes open on how to use that system. So reporting program income, I just kind of wanted to talk you guys through something that's going to be in the system that HUD will be doing. Prior to the Release 7.7 a grant's [inaudible] was changed to closed in DRGR when a grant closed out. And by doing that the system literally cut off any additional QPR from being able to be submitted.

It was just not accessible for grantee to add additional QPRs after the grant status was changed to close. This was limiting for NSP, because as many of you guys have program income that's ongoing and you are required to report on that as well as report on and document that affordability period. So this was a clear limitation in the system that needed to be changed to meet the needs of NSP.

So what's happened now as of Release 7.7 is when the grants are closed HUD can collect the grant status. So there's been basically new grant status added to the system, which is called closed or PI active, or programming inactive. And basically, what that does is it allows the QPR to be submitted and then they'll be submitted not required on a quarterly basis, but now on an annual basis. Here's a little screenshot of what HUD will be doing to make that change happen.

After the grant is closed with the PI active in the system, once a grant has changed to this not closed status or active status, which many of you are at right now, but a close with PI active, if

you're going to generate a new performance report with type called closeout. You'll see down here on the right-hand side that it says closeout as the new type. I just want to make sure people see that. If, for example, you see that or you're not at that stage yet please connect with HUD and you guys can talk through that, but that will be happening for many of you, that it will be coming to a close with your grant.

You'll be switching back from close to close with PI active. So you can report the reporting requirements for program income and to document your affordability period. Let me talk a little bit about data uploading templates. So this is something I know a lot of grantees will be very excited about, especially large grantees with still a lot of information they will be continuing to submit in the system or grantees that have many activities and therefore doing the voucher process can take some time, because they have to go in activity by activity.

This is going to be able to allow grantees to go into the system, what I call pushing information into the system quickly, easily and efficiently. As with most things, there's caveats to this. And so our goal here is talking through what some of those caveats are, because if you don't do it 100 percent correctly it will not work in that system. So it's really important to understand that. Right now currently in the system grantees can create both vouchers and populate certain QPR information by uploading templates.

DRGR has not just allowed you to upload information in the system, they've also actually given you guys standard templates. These templates you are not required to use, however, I highly recommend if you don't actually use a template you at least download it so you can see what the information is that's required in the system. Pretty important there. So even if you, for example, have your own system and you have your own documentation and everything and you think you can match it all up what I'm going to tell you in a second on the detail that's great.

However, I strongly recommend you still download the template and really look at this information as this system is requiring. It will be a good cheat sheet for you. For many of you, though, you'll probably want to use those actual templates. And so I'll recommend you go ahead and check into that after this call. I'm working through those standard templates that are provided. Some grantees also may use this to distribute to the responsible organizations or subrecipients that they can complete the information to send back to them.

By doing so you have an easy review of that information and you can upload it into the system as well instead of having to do any manipulation of data. So again, only specific skills are required for each template and [inaudible] must be in the correct order. You may ask, what is the correct order; how do I know which fields are going to be in it? We're going to talk about the fields specifically as well as I'm going to show you on the fact sheet where you get that information.

The columns and the correct order of the columns are also on the fact sheet, but this really where I'll have to recommend downloading the templates, because it's also going to visually show you what the correct order is for the column. Another key element here is not just making sure that you have the correct fields that are required and that the columns are correct that was in each field, you have all the information that is correct. So a good example here is if you have an activity type, and we just gave an example of a pretty long activity type, NSP-BARMSEHHL25.

If at any way you have any of those numbers or symbols incorrect DRGR cannot read that information. Again, whole point here is DRGR has to read the information you are inputting and that information you're inputting, that one-for-one match with what's in DRGR, it literally can't read it. So it's pretty important here. I know sometimes people have an extra space or an extra dash somewhere. It is imperative that that information gets reviewed correctly before doing uploads or else you will not be able to have accurate information then.

For QPR specifically, there's different sections of QPR uploads that will happen. For example, you can't literally upload all the information that you would have in a QPR. You can't upload that entire information in one upload. They've had to put it in sections. And so you would be able to populate or upload the information that's pertaining in a QPR section. Example of this section are QPR addresses, QPR beneficiaries, QPR expenditures.

There's just a couple examples of the sections that you would actually be uploading the information. You wouldn't upload the entire QPR in just one document.

Ryan Flanery: And Janine, one thing that we're looking at doing in the near future hopefully is a power user functionality. So the reason why it's broken out now by these different sections of the QPR, and we'll see going forward how the action plan is going to have a whole bunch of sections that you're going to [inaudible]. What we're hoping to be able to do is to create a template that allows you to update almost everything at the same time.

But it's really difficult, you have to understand the system very, very well and there's a ton of room for error. So it's going to be used probably only by a few grantees, but it will be extremely helpful in that hopefully the functionality will be there pretty soon. So if you're looking at this and you're saying, oh my gosh, this is going to be a lot of work going into each, I know DRGR really well, it'd be nice to do it all at once. That may be an option in the near future.

Janine Cuneo: Great. That's a great example, too, as [inaudible] people that know the system very well. From that example there, some of you, both NSP and CDBG-DR grantees sometimes have someone that does the NSP stuff and someone else that does CDBG-DR. Sometimes you guys don't even see it fit in the same [inaudible], in the same office or department. So that might be an example with some information you might want to consolidate into the same person and that same power user.

One last thing I want to talk about before hitting everyone over the head about the right fields, the right order and the right information per field, another really, really good thing is you have to write it on the right template format here. So what exactly do I mean by that? You might say, when I download this it looks like an Excel database to me, it just looks like Excel. There are multiple different file types that can look like Excel.

One example of it is called CSV and that's a specific format, again, looks like Excel that you need to upload any information on this data uploading template in the CSV format. How do you do it? Not so hard at all, I promise. If you're going to use a template from the system you can download the template into a CSV template. So already it comes as CSV. Another way, if you're

going to use your own template and it's, for example, an Excel template instead of just saving it you're going to do a save as.

And at the bottom of the screen in save as it's called file type and you're able to click and look at different file types of a document and one will be Excel. There'll be many others usually and on will be CSV. So important you always double-check, triple-check that you have CSV. If you don't know how to do it always go to a save as functionality and under the file type you'll be able to find a CSV. Go ahead and click and save it as CSV and then you can upload it.

I want to talk a little bit about vouchers. For the voucher uploading I just want to show you a little bit more about this. One thing I want to note here is only if you're a voucher requester are you going to be able to do this. And so you'll be able to see on the create a voucher, the first page of creating a voucher there's now upload a voucher functionality in the system. You'll notice here is this is what will pop up. You'll be able to check voucher type or select upload type.

And right here you can get the download template as well on the screen you'll be able to select the file to upload. So you can go ahead and download that template, check it out, see if you want to use that template, you want to use your own template. Again, if you use your own please make sure you triple check it matches the download template 100 percent. And then once you're done with it you can go ahead and upload that right here by browsing, finding that template, again, make sure it's CSV and go ahead and hit upload.

I will show you how to actually download templates so you can check out a little bit of the information. So after you hit download template, usually you're going to see a list of available grants. Make sure you have the right grant, especially for vouchers. You don't know how important that is. Select the grants that you want and use the arrow to move it over to the selected list. So this is our available list on the left-hand side.

You're going to select which one you want and move it over to the selected list. You're going to go ahead and hit export at that time. Important to note here, as I mentioned before, you can actually export this as a CSV file format. If you do that that will hopefully make your life a little bit easier once you want to upload that template. Once you get all the information in there you're going to go ahead and upload it. So pretty important there that you start out on the right page.

Once you get that exported you can use exported template to upload additional information that you want to have in this voucher report. So if you only want to have 20 out of your 50 activities to be included you can go ahead and manipulate the data in there, add the dollar amount that you want and go ahead and upload that. And hopefully that will make your life a lot easier when trying to create vouchers in the future.

We're going to do a little bit of a pop quiz for folks. So one of the grantees, Kyle is about to upload his list of vouchers and he needs to figure out what's wrong with his voucher template. He's trying to do it and it's not working. He's using the correct columns. Again, for a voucher template, and I will show you where the cheat sheet is so you know what columns are necessary, but for a voucher it's grant number, activity number, fund type and amount.

And he has this correctly. He feels that all of them are going to be PS and is the amounts that he wants correctly. He's double-checked the activity numbers and those are correct. Now all of the sudden he's double checking, he's realizing that the grant number on one of the rows is incorrect. Specific, you will notice on row three, such a small little thing here, but B-06, there's no dash here. That needs to be B-06-BG-28-0001. So if there's a little dash like that the system will have problems reading that data.

So imperative that that kind of information is double-checked. Now, I'm going to talk a little bit now in more depth about uploading the templates for the QPRs. Again, as I mentioned, some of the sections are going to be doing them by sections and as Ryan mentioned, there might be a power user and that will be available and probably only used by a few grantees out there. So most of you that will want to be using an uploading template feature will be uploading information at different sections.

Again, examples are addresses, beneficiary and expenditures. There's also accomplishment and activity progress. There's different type of uploads that you can do. Once you're into the QPR, meaning you have already added your next QPR in and you're wanting to edit the performance report you'll go ahead and you'll see now that there's a link called upload QPR data. And you'll be able to look at what upload type you want. So first it's going to say, select upload [inaudible] to your QPR and then it will allow you to look at the different upload types that are available.

So if you're wanting to upload your QPR address information or beneficiary data that's where you'll do it and you'll be able to go ahead and browse, find that data and upload that file. To actually download the template per each upload type you'll also be able to do that on this screen. You'll notice on the bottom right-hand corner, I'm sorry it's a little fuzzy maybe for some of you, download template is the button that you'd go ahead and push. Just like the voucher you'll walk through that download template, export it as a CSV file and you'll be able to get information out of it and then be able to report information back up.

So another little pop quiz for folks when they're uploading templates or QPR, a grantee, Loretta is ready to upload the following Excel documents she just received from her last two responsible organizations.

So what she did is she has a reporting system with her responsible organizations where they send her information. Specifically what she did with that information was she wanted to upload this narrative, only the narrative, and what she did is she deleted all the columns and only included the columns that are part of the QPR narrative and that is grantee activity number, progress narrative and completion data. And so she was like, I have this ready, I'm only including the data that is required in the system and necessary, because she was ready to upload it.

She has one flaw in this. All the information is correct, the file is wrong. You'll notice in this two different file names we gave you she was going to upload south county QPR narratives, XLXS. Right there, that XLXS should say CSV. That's one we could always guarantee what you're uploading as a CSV file is that the letters after the dot at the end of a file will tell you what your file name is, your file type is and this is a great example where this tells us this is actually an

Excel file and not a CSV file. So if you get this, stop, just save as, find CSV as your file type and you'll be able to upload now on that file.

Before we go into other updates, Vinnie, can you go ahead and I'd like to go back to the website. Great. So as you might be familiar again, this is back of the OneCPD Resource Exchange. I'm on the DRGR page and I'm going to be opening up the DRGR data uploads fact sheet.

This is a fact sheet that really gives you an in-depth look at how to do the uploads that we've been learning about today. I want to show you on page 2 is really what I call the cheat sheet here. This tells you the type of columns that you need to have, the information that you need to have per column, per upload to type. So let's just review this for a second. Now, we have to have the exact columns and the exact order of those columns and no additional information in those columns.

So for example, in the upload type of vouchers, if you're trying to upload a voucher file, again, CSV format is voucher file, the only columns that you do not just need, but you can have in order for DRGR to review the information is grant number, activity number, fund type and amount. So it's essential that's all the columns that you have. Please make sure if you have any extra columns in the downloaded template or from your own template you've deleted those before any files are uploaded.

Here's an example of [inaudible] with the QPR upload type. So let me just take you to your addresses for a quick one and then you'll notice there's just five -- grantee activity number, state, address, city and zip, in that order. Essential that you put those in that order those type of names. Let's go down a little bit further, it gets a little bit trickier when you get to QPR accomplishments or QPR beneficiaries. The reason why that it gets a little bit trickier is that you need to have the correct title of the different performance measures that you want to add.

You'll also have to match the DRGR value for both the performance measure and the category and you must match the DRGR's data records for any data input by yourself as a grantee. Let's just review what I'm saying there for a second. So for example, under QPR accomplishments there are four main fields, but let's just talk about those fields for a second. There's a grantee activity number, then there's different performance measure fields that you would have, different category and then numbers.

So for under the performance measures I'm going to look down at the table below my upload type column data and it gives you a column example DRGR value. So I'm going to look at, again, a QPR accomplishment type. So I'm going to go down and look at the QPR accomplishments and see which kind of value is in there. So for example, there are a variety of different performance measure columns that you could have. You could have number of housing units, you could have number of single family units, number of multifamily units, etc.

For the different type of accomplishment category fields that you could have, you could have low, mod, total, etc. So you really need to stop, download those templates first, see exactly how those are set up so you can really understand this a little bit better. I wanted to highlight for you that this is a good cheat sheet for you to see the different upload types that are available and then

for the two really main upload types that can cause you a little bit of anxiety, just QPR accomplishments and QPR beneficiaries. There's a whole other table that gives you a little bit of a cheat sheet.

So an example here for QPR beneficiaries I'll go under this final one is you would have a different performance measure value. Let's go down here to the column, what does that mean? That could be total households of Hispanic/Latino, households total female, households owner total, households owner Hispanic/Latino. So different DRGR values need to be part of that performance measure column.

And then also, you could have race, so you will need to have a race category column. Here's just an example of why it's imperative that the DRGR values must match. There's one value in DRGR called white. If you put Caucasian in there it will not read this. So if you want to add the race category of white you will need to include literally white, not Caucasian or any other type of a race category outside of those that are given to you here. Again, this was on DRGR data uploads fact sheet that can be found on the DRGR section of the OneCPD Resource Exchange.

I got there by going to the resource library and clicking on the curated page for DRGR. Vinnie, can you get me back to the slide show? Great. I just want to give you a couple of other updates and to let you know about a release 7.8 coming up. We [inaudible] this a little bit earlier in our conversation that there's going to be an action plan upload as well that will be coming out in release 7.8. That will also include templates for folks to be able to download and use as well.

Another release coming up with a voucher enhancement. It will have an additional recalculate button. Hopefully that will be useful for folks who are trying to understand the funding they have available when they are doing multiple lines in a voucher or an activity of those program funds or program income. Once you put in information in there as the dollar amount you'll be able to recalculate to see actually how much money you have left so that you're able to figure out your program income, program funds per activity at the point of time you're literally doing your voucher.

There will be a new version of Micro Strategy [ph]. And lastly, subordinate organizations, this is actually not part of release 7.8, it's part of a current 7.7 release. CPDG-DR users, the disaster recovery users are more likely to use this in NSP. So we're not really focusing a lot of time on this part here today. There's a fact sheet on it. Feel free to go ahead and review that fact sheet. The basics of it is that DRGR is now allowing users to authorize restricted access to users that are maybe from your subordinate grantees using the responsible organization screen.

So what does that mean? If you have subordinate grantees that are part of a responsible organization and that responsible organization actually has access to the system already, for example, they have their own NSP grant or a CDBG-DR grant then you at the grant level may give authorization to one of your subordinate grantees to go into the system only under the activities that are part of the responsible organization activities that you have and they can be able to manipulate certain things in the system that you allow.

So for example, a grantee admin user that you give specific roles, such as you can ask someone to edit an action plan activity under the responsible organization screen that they have. Let me just give you an example of that. Just throwing out a state here, the state of Pennsylvania and you want to give a city that has maybe 10 activities, you've given them money, you've done 10 activities for them and they're the responsible organization and you want to make the choice that they can go in and edit their own activities.

Then assuming that we have an NSP activity and/or CDBG-DR grants you can give them access and they can go ahead and edit that screen. The same would be true that they could submit voucher requests and then only under those 10 activities that they're responsible organization for and they also can submit QPR activity profile information, again, under those 10 activities that they are responsible organization for. So some grantees might think, I won't want to give that much access, I'd rather take in the information and me enter it.

Other grantees might think this is a great thing to use in that they're able to monitor the information put in, but they do not have to physically put that information in. I highly recommend this on the use of large grantees, like a state, especially because many of you that are smaller responsible organization most likely would not be in the system for another grant, like NSP or CDBG-DR. So it's really your choice as larger grants or state grants.

And if you are a state that's interested I'd highly recommend stopping and reviewing what exactly is involved in this. Then that fact sheet is available to you.

Ryan Flanery: Janine, do you think we could just briefly go back and just discuss the enhancements to the recalculate button? Forgive me if I missed what you said there, but just to discuss exactly what that's going to be doing, because I think it's going to be really helpful for grantees just going -- you know, we've done about 30 or so DRGR workshop trainings out in the field over the past couple of years and one of the things that has really confused grantees is the voucher screens where they showed this available amount in a column.

And the available amount is really based on a number of factors that's mainly how much is budgeted, obligated and then available based on whether or not there's program income in a particular program income account or associated with a certain activity. And so sometimes it'll show, for example, if you have a program funds activity and then if you're trying to create a line item with program funds for an activity and also with program income when you have program income on-hand, you might have \$20,000 program income on-hand for this activity.

It'll show the \$20,000 of PI as available, but zero in program funds are available. Well, you know that you have program funds available for that activity. The reason the system is showing that zero is because you have program income on-hand and you can't draw program funds until all your program income is gone. So what this button will do is you will be able to enter your amounts, you know that you have X amount of dollars available in program funds for that activity, you'll enter the \$20,000 in program income in the line item and then you'll enter \$10,000 in program funds and you'll hit the recalculate button.

And it'll then show zero program income is available on the program income line item and then whatever the amount of available program funds for that activity in that program income account is available for that other program funds line item. So it's going to help clarify exactly how much money is available. And see, the reason the system doesn't do it now is it just can't predict the future; right? It doesn't know how much you're going to draw for each particular line item. So that button is going to allow it to recalculate those amounts and I think it's going to be a pretty useful functionality.

Janine Cuneo: Thanks so much, Ryan. I think people will be very excited to see that. Do you have a sense of when release 7.8 is scheduled to be done or is it too premature to announce that?

Ryan Flanery: About a month. So mid-December, knock on wood.

Janine Cuneo: All things good.

I just wanted to show people a little bit of a preview of what the, again, release 7.8 update action screen could look like. So this is when someone's going in to edit an action plan. Most likely there'll be an update action plan button right at the top of your screen, action plan and you'll be able to go ahead and print that. There'll most likely be multiple different upload types, like QPR where you're not going to be able to do everything all at once.

You'll have to chunk this out by sections. And so right now we're looking at a couple of different sections called contact data, add/edit. Again, more information will be provided on exactly what will be needed per type, but most likely there'll be more than one type. And then you'll also have a download template, meaning you'll be able to download the template from HUD and view what the columns are as well as you can use that template yourself to populate data and then upload it to the system.

Let's just go over a couple common questions we're hearing right now. Although this is so new, we're not hearing tons and tons. So happy to take more questions right now today. I just want to go over a couple things of what we're hearing out there in the field. Why do I keep getting an error message when I save my data? We just wanted to pause here. There's many reasons for error messages, but one of the reasons people are getting error messages, you might be in the wrong type of browser you're using.

So DRGR likes Internet Explorer or what many people call IE 7, 8 or 9. So pretty important that you get information for DRGR through the IE or Internet Explorer 7, 8 or 9. Using Chrome or something called Mozilla Firefox doesn't always work and there's no guarantees that it will work.

Ryan Flanery: And Janine, one thing that we've seen with Internet Explorer 10 is if users click the little compatibility mode icon, it looks like a little torn piece of paper next to the URL bar, then usually that eliminates their problems. And one of the big problems we've seen with folks who are not in that compatibility mode is there are certain drop-down menus that they know they should be able to edit and they're just grayed out. And I'm not sure why. It's just, again, a compatibility issue. But if they click that little icon it usually alleviates the problem. That's in IE 10.

Janine Cuneo: Great. So just to clarify that, he was saying that little torn icon is next to the URL. I guess there are people that [inaudible] URL is the www.DRGR.HUD.gov. Don't quote me, I can't always remember what the exact website is. But it's literally next to the URL is that www and right next to that you'll see that little torn piece of paper he's talking about. Click on that and it will instruct you to get compatibility. Again, that was in IE 10. Another common question is, why is my data the same even after making a draw?

I just want to reiterate to people that DRGR reconciles this data daily and sometimes the timing of the reconciliation varies. So sometimes it's a very short period of time on your data showing discrepancy, other times if you're a good 10, 15 hours out from when it's going to reconcile you could be having a little bit of a drag. So I just remind people data daily reconciles in DRGR.

Ryan Flanery: And just as a reminder, in the past up until 7.7 the performance data was pretty much at the time of. You know, it updated immediately. So if you entered performance measures and then saved your QPR you'd be able to look at a report and it would show the data immediately. Since 7.7 it's now on a daily update similar to the financial data.

Jim Yerdon: All data is captured overnight.

Ryan Flanery: Yeah. I think it's 9:30 at night where they reconcile all the data. So if you're used to seeing data populate immediately and it's no longer doing that, that's why.

Janine Cuneo: And just to clarify, is that 9:30 eastern time?

Ryan Flanery: Eastern. And don't hold me to 9:30, it's around there.

Jim Yerdon: If you're on the system at 9:00 o'clock Eastern Time it will boot you out of the system without warning.

Ryan Flanery: [inaudible] system at 9:00 o'clock anyway. Come on.

Janine Cuneo: Those that are on the West Coast at 6:00 just make sure you keep saving and those who are out in Hawaii doing even more math there figuring out when you've got to make sure you're in the system or out of the system and saving. My last question that some people have asked, what happened to my Micro Strategies report? So their Micro Strategies report folders were consolidated recently. And so those are all there; you can still access the standardized reports that are out there.

But not many use this functionality, but some of you to do some customize reports that you've created and saved in what's called the my reports folder. Those were not moved over. So you'll need to rebuild those if you like the customized reports and use that folder. Vinnie, I know we see some questions in the queue. Can you remind people how to ask questions and then we'll get to answering those? Before we do that, though, Ryan and Jim, is there any additional comments you need to make before we get into the Q&A section?

Ryan Flanery: I don't have anything. Jim?

Jim Yerdon: No. I don't either.

Ryan Flanery: John?

John Laswick: Go ahead.

Janine Cuneo: Great. Vinnie?

Vincent Grady: Great. Thanks, Janine. So again, to ask your question you have a questions box on the toolbar of go to webinar. You can just type your question in and we'll be going through those now and hopefully answering your questions. If you dialed in on the phone with the phone number provided you can ask your questions audibly. So you can choose to raise your hand and then I'll go through the attendance roster and if I see your hand raised I can unmute your line and you can ask your question to the panel.

So we do have some questions now and I'll go through them now and pose them to the group. So the first question is, "When will the five be available to download and make notes?"

We apologize, we didn't have time to upload these to OneCPD Resource Exchange before the webinar began. So they will be available for upload immediately after and you can download this at any time and print them.

The next question was, "How do you get to the maintain addresses section?"

Janine Cuneo: That's a great question. I'm going to go back to the slide that shows you that. I think that if you're like me I like to visually see things. So let me just scroll back while people have to see me scroll back. So here's the maintain addresses link where once you hit on that you'll get to the next screen that shows you maintain addresses. You're going to be able to search and get to the rest of that.

However, to get to this maintain addresses in DRGR when you are in the system you're able to see there's a bar that literally goes across the top of the screen that says admin. You click on that and you can get to the admin section of the system. You get to the action plan module, there's a draw down in QPR, you get to the QPR module. If you click on the QPR module, once you do that you're going to see a list of different grants that come up. If you only have one grant you'll only see the one grant, but some of you have multiple grants now at this time, either multiple NSP and/or CDBG-DR.

So if you're one of those who have multiple grants you will be able to click on there and add/edit QPR and you'll want to click on the right grant and the correct grant that you want to go in to maintain the addresses on. And once you do that this window will pop up. It's the same exact way you go into the system when you want to add a QPR. So if you're ready to start your next QPR and you go into the system, you want to add that QPR into the system and start it, the same way you do that is the same way you get to maintain addresses.

So again, you click on the QPR module, then you go to the add/edit QPR link on the correct grant that you want and once you do that it will pop up this window. Usually you have to scroll through, there's tons of reports on the bottom here that you've submitted usually, because of the link of NSP 1 and 2, especially. And on top here it gives you the basic information about the QPRs you're looking at.

And this, for example, shows you maintaining address link in that box above. Once you click on that it will pop open to another screen and you'll be able to search the addresses by that grant as well as see a list of addresses if you just want to see them all. I hope that helps you out there. If not, please write in and we'll try to find out more information to provide you to get you to that.

Vincent Grady: Great. Thanks, Janine. So the next question. "In reference to slide 10, where would this information be entered initially? Janine mentioned that we must go back, if we didn't already answer this information, but did we ever have the option to enter this before now?"

Janine Cuneo: No. I'm trying to think. This is just 7.7. Was this ever part of any other releases recently, Ryan? Do you know what we call it?

Ryan Flanery: No. I think your point was just because you entered an address in the past it doesn't mean that you don't have to go back and answer this data now. There was never any other format for it to be provided to HUD. So this is the first opportunity to do so, but it will apply to all addresses that will require a post-closeout management.

Janine Cuneo: Great. [inaudible] again, this is kind of new information that needs to be provided, although, not new -- everyone always is going to have to provide some type of affordability reporting information to HUD. As usual, it's going to be required by the grant. So this is now codifying where to provide that information and giving a one-stop shop for that information.

And just to reiterate what Ryan said earlier, and Ryan, please correct me if I'm repeating something incorrectly here, but what I heard is that the other templates that you might be able to have for QPR vouchers, there will be a template for being able to upload this type of support information as we would be for QPR or vouchers and a quick sweep of it via an upload template; is that correct?

Ryan Flanery: Yes. It's correct. We're testing that right now and it's supposed to be in the next release. So mid-December.

Jim Yerdon: And Janine, this is Jim. This information will be required before the grantees can close out.

Janine Cuneo: Thank you, Jim. That's a great reminder. For those of you that are worried that you've never inserted this information, you have tons of addresses in, I may recommend that you ensure you start correcting all this information if you have not corrected it. Many of you have,

because that's part of the process of having to know the affordability periods and how much is going to be your end use and what's that national objective for end use.

So these are all normal requirements of NSP. So you should have all this information. Some of you might just have it in different places. I might recommend that you start collecting all that information now and then once that data upload is available the next release you're able to do that easily instead of having just do your DRGR address by address. I may recommend that you collect all that information, take the opportunity in the next few to collect this all and get ready for that upload template to be available.

Once that's available go ahead and use that for the information in that upload template and go ahead and use it and upload it into the system. Vinnie, do we have some more questions?

Vincent Grady: Sure. Thanks. We do have some questions around types of CSV files. "I have three types of CSV files available to choose from when I use save as, comma delineated MS-DOS or Macintosh. Does it matter which format I use?"

Janine Cuneo: My experience -- oh, go ahead, Ryan and Jim. Sorry.

Ryan Flanery: Yes. It's comma delineated.

Janine Cuneo: Great. If you are having trouble with any of that please let us know, but it should be comma delineated and then you should be good. Some of you don't have multiple CSV file types to choose from, just one. Please go ahead and use that and give that a try.

Vincent Grady: Okay. The next question. "What happens when you try and upload vouchers that you do not have available funds for? Does it still return the correct error messages? Does it upload some of the line items and not others, etc.?"

Janine Cuneo: I don't think I've tried that example out. Ryan and Jim, do you have the answer to that?

Jim Yerdon: It's an all or nothing situation. If you've got some incorrect data there it'll reject everything you're uploading.

Janine Cuneo: So probably important to note that that's not just for the vouchers. So the example here is we don't even have available funds. Will it still accept it? So for example, if you did a calculation wrong and you only have \$100 left and you're trying to create a voucher for \$101 for a specific activity type that will make null and void that entire upload that you did. You know, 10 activities you're trying to upload, that 1 activity is wrong, it will null and void that.

It's important to note that this is a theory that the thing that will run through all of the uploading templates and all of the uploads that you like to do, it's an all or nothing situation. So the example I gave before that that one dash was often at-a-glance number. It doesn't mean that all the other data will be entered and just that one row won't be -- it's an all or nothing situation here. So you've got to have all the information correct for it to work.

Jim Yerdon: Janine, this is Jim. One thing that might be useful to know is when they do an upload and let's say you had 15 lines of data it'll return a brief line item on the screen that tells you 15 lines of data uploaded or 15 lines of data, zero lines of data uploaded. So it's not an error message, it's just a little report. So if you've got zero lines uploaded you have to troubleshoot, what did I do wrong?

Ryan Flanery: Well, you can also download a report that does tell you exactly what -- well, pretty close to what happened. It's a little bit, actually more descriptive than what the normal DRGR error messages are, like the administrative error or the system error, contact your administrator, which happens all the time and doesn't really tell you anything. These tend to be a little bit more descriptive and I think they can help, but you actually have to go and click a button that says, download report.

Jim Yerdon: Yeah. On the same screen that tells you how many lines of data you had, how many lines were uploaded there's a little button that says, download report.

Janine Cuneo: So I'm just going to repeat to make sure we all heard that and please correct me if we heard it wrong. So when you're uploading it you get a transmission back, I guess I'd say that basically states how many lines were accepted. So if it says zero lines you've got a problem. And if you want to continue to use it and you don't see quickly what the problem was or you didn't think you had a problem you are able to click on a button on that same screen when the transmission comes back and tells you zero lines, that it will be able to give you a pretty descriptive error report that will hopefully let you troubleshoot what that error was; is that correct?

Jim Yerdon: That's correct.

Janine Cuneo: Great. So it sounds like it's very important, when you upload the CSV file document that you wait until the transmission report comes in and you look at how many lines were accepted. If you're at the zero line you've got a problem. That's a great trick. Thank you, guys. Next question.

Vincent Grady: So the next question. "We are having issues downloading any QPR templates. When we open any QPR template they say" -- this user copy and pasted the error, which, I'm sorry, doesn't translate well on our questions log. "So it's an error that kind of says no data returned for this view. This might be because the applied filter excludes all data." And he follows up by saying, "We know we have active activities. So our activities should show up in our template."

Ryan Flanery: So sometimes, and I'm not exactly sure why, user accounts will get detached from Micro Strategies, because keep in mind, Micro Strategies, which is what's producing those templates is a third-party software that's linked up in a DRGR. We actually have to go through a process of connecting the user IDs. You know, you get your access to DRGR, but you will then get linked to Micro Strategies to enable you to pull data, to view data. And sometimes that gets broken, for lack of a better term. So if you've encountered that error just shoot me an e-mail.

Jim Yerdon: With a screen shot.

Ryan Flanery: Your name and user ID and then we'll forward it on to the Micro Strategies folks who will repair your connection to Micro Strategies. Is my e-mail on here at the end?

Janine Cuneo: It's actually on at the beginning on the second slide. I'll go ahead and go up to that.

Ryan Flanery: Okay. It's [Ryan.D.Flanery@HUD.gov](mailto:Ryan.D.Flanery@HUD.gov).

Janine Cuneo: So Chris, I believe that's you out there, you also asked a question of you can go through to the process step-by-step of how to download the QPR template. It sounds like you are having this issue that Ryan and Jim described that basically your DRGR has had to be coupled from Micro Strategies. If you can go ahead and connect with Ryan I think that will provide a great description on how to do that. They'll be able to support you on that.

For others that are out there, I only presented really how to download the voucher template. It's really the same exact system. So if you're having the same issue around an error message comes up please contact HUD or the help desk. As always, give them a screen shot, let them see stuff and your user ID, user information and tell them what the problem is. I do want to highlight here, there's a good example here just to remind people about Micro Strategies versus DRGR.

They're systems that talk to each other, they're not the same system. And so whenever there's an activity that happens through Micro Strategies it has to show data, read information from DRGR and vice-versa. So there's just always an opening for little glitches and errors to happen because of that. And as they said, they put the templates in Micro Strategies. And so to access those templates it's got to read information correctly and accurately, and that's where glitches can occur. And Vinnie, next question from the next user.

Vincent Grady: Sure. So the next question is, "When you make changes to address those, are the beneficiaries affected?"

Ryan Flanery: No. They're not. Addresses are separate from the beneficiaries. You'd have to actually go in and make changes to the beneficiary data if you wanted to change the beneficiary data.

Vincent Grady: Great. Thank you. Next question. "Are you planning to add an upload feature for the admin module, specifically for the monitoring information?"

Ryan Flanery: Yes. We are. I have to look at our schedule again, but I believe that should be coming around probably sometime by late January, but that's on the agenda. We'd like to have uploads for really all the major functionality in DRGR.

Janine Cuneo: Great. So keep your eyes out for that. We'll provide more information probably in the next few weeks on [inaudible] what features releases will happen.

Vincent Grady: Great. Thanks. Next question. "Will we as grantees be able to close out individual subgrantees as each ties up their project and establishes the annual QPR cycle or will we need to wait until all the subgrantees have completed their projects before changing the QPR deadline to annually?"

Janine Cuneo: I think you've got to wait until all of them -- unless Jim and Ryan, are you guys -- the different notices, others that I'm not aware of, I'm pretty sure you have to wait until all of them happen.

Jim Yerdon: It's the activity that has the completion, not the responsible organization. So if they set it up correctly and have for each activity with the different responsible organization and responsible organization A is done and B is not, but they were set up in two different activities then they should be able to close out A, but not B.

Janine Cuneo: Well, I think the question specifically, though, is around by doing that, does that establish them at an annual QPR cycle or do they still have --

Ryan Flanery: So the annual reporting for program income and affordability, all that takes place post-closeout. So you'll have to go through the whole closeout process. John can speak to that better than we can.

John Laswick: Yeah. I mean, I guess what I'm thinking about is if you have a closeout procedure with your subrecipients that's your prerogative. You're going to close out with us one time and all your activities are going to have to be complete and they're all going to have to meet a national objective. There's no requirement on our part that you have a closeout procedure for your subgrantees, but it might make your life easier, but it won't affect the closeout process generally.

And you'll switch over once you have closed each year's grant. You will then go to an annual cycle.

Janine Cuneo: So one little quick tip here then to think about is that, and this goes back to the beginning of QPR and information we provided you in QPR-101 is that you only add activities to a QPR where you've had data to enter. So if something has happened and you need to provide that as a narrative if you have performance data that is coming in, etc. then you add that activity. So if you have an activity that has, in your terms, closed out, meaning you wrapped it up and you don't have information to provide HUD, but annually then you don't have to include that activity every single QPR.

So towards the end of your grant there may only be a couple of activities that you're reporting on quarterly and the rest might be already closed out. Obviously, it would be different per grantee, but it is essential to understand that to change to an annual QPR cycle happens every grant level post -closeout. It's not at the per activity level or per project level.

Ryan Flanery: And in DRGR when you're finished with an activity the terminology in the drop-down menu is completed, right, for the activity?

John Laswick: That's right, for the activity.

Ryan Flanery: So you have plans underway completed and canceled. So in this case you would be selecting completed in your action plan and that would then -- I believe it reports one more time in the QPR and then it no longer shows up in your QPR. So you wouldn't be reporting on that activity anymore. I assume, though if there is -- I'm trying to think if there's a situation where they might be collecting data onward. I assume they would still in a situation where they would have affordability requirements.

You'd still be collecting that information from your subrecipients, but you just wouldn't be reporting on it quarterly anymore.

Janine Cuneo: And in that completed status --

John Laswick: Yeah. If you have new activities with program income or additional activity after closeout then you'd be reporting on that, but that would be annual also.

Ryan Flanery: Yeah. But there's a distinction between a completed activity and a closeout grant. That's the key point.

Janine Cuneo: And just to verify if someone does go in and selects completed, are they still able to report on program income or does that limit that reporting functionality, meaning drawing?

Ryan Flanery: No.

Jim Yerdon: No. They won't be able to draw once it's completed.

John Laswick: You no longer can select that particular activity in a line item on a voucher.

Janine Cuneo: Now, let's remember, guys when they say completed it's not the initial program funds; it's the entire activity, so you have program income off of that activity as well. Do not put it in completed yet.

Ryan Flanery: If you're continuing to carry out that activity with program income then you would keep that activity open. If you're totally done with that activity you can mark it as complete and you may be generating program income going forward, but then you might be using it on a different activity. So you'd still receipt it and I'm pretty sure that you could still receipt against a completed activity.

Jim Yerdon: Yes. You can.

Ryan Flanery: So you receipt it against a completed activity, but you would be able to spend it on other activities.

Jim Yerdon: On other activities. Yes.

Janine Cuneo: Great. So I know we've gone a little bit off on the original question here, but I think it was important to note between closed, post-closeout and completed as well as if you are completed with your activity, meaning fully completed, no, you will not be using any more program income or anything like that on that activity since you literally completed it. You can hit complete as well as you do not need to continue to report on that quarterly for that QPR on that activity. So something to keep in mind as well on how to do that.

Vinnie, let's go to the next question.

Vincent Grady: Okay. So the next question refers to slide 10. "Is post-closeout data required on every activity?"

Janine Cuneo: Probably the best question for John as that's very specific more to policy than really DRGR requirements.

John Laswick: You know, I don't want to get tripped up and confused between the two sets of language here, but when you close your grant out you're going to close your grant out one time. And your activities should be completed by that time, although you may still be receiving program income. You can use that program income after closeout for new activities or to continue.

You know, you might have to start them back up again. I don't know, what was the first part of the question again? I feel I'm not really answering it.

Janine Cuneo: Well, they're wondering on the information on the slide that's on your screen right now, which is the supporting data with respect to affordability, start dates, end dates, activity type for end use, national objective. They want to understand if that is going to be required on every activity. And I think this is my theory, [inaudible]. The theory here is just because it's a DRGR doesn't mean it's required. You've got to go back to the pulse prescription [ph]. And so he is really asking, is this going to be required for me on every activity that I do?

John Laswick: And now it's incomplete.

Ryan Flanery: Right. So I think that the key point to understand here is that this is what you'll be reporting on for activities that are not complete or are carrying on post-closeout and those will mainly be related to the program income that's being generated or hadn't yet been spent at closeout. So to answer your question, no, it's not for every activity. And also, keep in mind that this is at the address level.

So it goes a little bit deeper than the activity, because there could be many addresses per an activity. This is going to allow you to report on those addresses and to be able to comply annually. So you're not going to be doing this every quarter, but you'll be doing it annually and you comply with the affordability requirements. So some activity types require you to maintain records of meeting your affordability requirements and all that. You're starting to add dates.

John Laswick: So it'll be a separate form. So this is basically a streamlined version of what you're doing on a quarterly basis now.

Ryan Flanery: Well, I just will say this. I'm sorry to interrupt. But there is known to be additional guidance coming out that is going to explain how and when you're reporting on activities post-closeout. So I'd just keep an eye out for that additional guidance. It should be coming pretty soon.

John Laswick: Yeah. So Ryan was just asking me before whether we were through our review process and we're very close. So we do expect to be able to issue the draft closeout notice and then at that point we'll be going to the Paperwork Reduction Act process. Everyone dissolves in laughter here. But in other words, we will have a closeout process in early 2014. We are also working on the guidelines for that. So all this post-closeout stuff actually will do you some good while I'm still working for HUD, at least.

Janine Cuneo: Great. So I've been highlighting here post-closeout. It's on the top of the screen on the slide, too; we're going back through these. Slides, just trying to get more information, this is post-closeout supporting data. Vinnie, let's go to the next question.

Vincent Grady: Great. The next question, "We have addressed this in DRGR that we only incurred delivery costs and the deal did not close with the client. Can these addresses be deleted?"

Janine Cuneo: Yes. I have not heard any other guidance. My understanding is that you only include addresses as well as performance measure data on when they've met a national objective. Delivery costs technically don't meet a national objective; they're part of the delivery of a project. So for example, if there were an architect or an engineer to look at a property and for whatever reason that property didn't go through then you're able to still recoup the cost of those, yet that does not mean that address is entered. Is there any different guidance that I'm not aware of, John, on that?

John Laswick: No. I think that's correct, Janine. So you can charge that to the activity. So if you're out buying and rehabbing 30 units and 1 of them falls through you can track the program for that. Hopefully you don't have a lot of fallout. But you really would not want to have addresses in there for properties that you're not moving forward on, because at some point somebody's going to want to know what's going on with that.

Ryan Flanery: And let me also make the point that as a reminder, and I understand that this didn't happen early on, but you're only supposed to enter the addresses for properties that have met a national objective. So unless you've met a national objective a property address shouldn't be in the system. And if it is and it no longer is a valid address, you're no longer rehabbing it or doing whatever then you can delete it.

John Laswick: Yeah. Good point. So when we say met a national objective with a housing unit we're talking about somebody is living there, somebody with an income eligible household is

occupying it. So you really shouldn't have those in there to begin with, but it's not the end of the world. Just take them out.

Janine Cuneo: So for a lot of people this will be an opportunity to really evaluate and do some deletions. I know that's been something people have wanted to do for quite some time. I think this will allow a one-stop shop to be able to maintain your addresses and evaluate what actually went through and what didn't go through. If you confront them early, address inclusions that were incorrect and didn't fallout, the guidance that is just given now has been given many times before then it must meet a national objective for housing units. You know, generally that means literally an eligible person in the house living there.

Ryan Flanery: And we fully anticipate that addresses will be deleted. As a person who looks through this data and tries to make some sense of it I'm really looking forward to the process of cleaning up the data so we can an idea of what -- because we have addresses in there right now that are not actually part of the program. So I'm looking forward to that data cleanup that's going to take place.

John Laswick: Well, that affects other things that we're doing too. For example, the TRF process on clusters of activities. I mean, if we have addresses in there that have phantom addresses then we may have clusters that are not really clusters. [inaudible] start a lot of analysis that we're trying to do and trying to present to Congress, the press and so forth.

Janine Cuneo: And let me just take this one step farther, because I feel a person that asks for some clarifications [inaudible] is around demo units. I know it was a hot topic a while ago that got sent out a demo policy guidance, that this came up again as his demo units that were not replaced, do I not put an address in? Can you guys reflect on that a little bit just to ensure that we're still singing the same tune here about demo units?

Ryan Flanery: I mean, if you aren't meeting a national objective through some of the removal of ablated property then I believe that the guidance has been to enter those addresses.

John Laswick: Yeah. In fact, most of the demolition out of the several hundred thousand units that NSP expects to address, about 25,000 to 27,000 of them are demolition units and most of them are showing up as completed, because the national objective is area benefit to the neighborhood. And there's no requirement to replace those units. I mean, sometimes they get replaced, but to replace it that's a housing unit, that's not the demolition. But we do want to know which units have been demolished and that's the [inaudible]. [inaudible] not to have a family in the unit there. So go ahead and put those in for sure.

Janine Cuneo: So the key example was the national objective. What is that national objective that's being met here? The national objective, as John said, a vast majority of the demo units that HUD is aware of that is being used in NSP funds is for area benefit. So if that's your national objective you're meeting then you've met that and you do need to include the addresses.

Ryan Flanery: And let me just clarify that if a unit has been demolished for replacement, after reconstruction or a redevelopment then our guidance has been to not report that demo as a demo.

You're going to report that as part of the primary activity, which is either the rehab or redevelopment. So maybe that's what the question was getting at, but you wouldn't have an address associated with a demo if it's leading into or a part of either a rehab, reconstruction or redevelopment.

John Laswick: Yeah. Good point. I think most of them are not, but there certainly are quite a few where there is a replacement use.

Ryan Flanery: So I would say if you did do that then that's another opportunity to go back and delete the address so that the data is clean.

John Laswick: From the demolition, because it's really part of the reconstruction of that.

Janine Cuneo: And as I mentioned before, demo became a hot topic, I don't know, maybe nine months ago now, maybe even a year ago. There was a HUD, a rather comprehensive policy guidance on demolition. So if you are doing a little bit more [inaudible] -- excuse me?

John Laswick: [inaudible]

Janine Cuneo: Say that again.

John Laswick: It was March 14th. I was just reading it, because we had a question come up before.

Ryan Flanery: It's still a hot topic.

Janine Cuneo: Wow. Exact date for you guys. So March 14th policy is going to have demos. If you have more of a complex demo, an area benefit clearance happening in demo then please write this down that there was some demo guidance given -- there was a little bit of a DRGR guidance allowed. And another place too is there was a NSP performance measure guidance given out for DRGR users. And so don't hesitate. Again, you can find these on OneCPD Resource Exchange to look through and evaluate and there's some quick tips around that. And that also included everyone's quick pick on demo. So lots of guidance out there for you to look at. Hopefully that clarified that question.

Let's go for the next question, Vinnie.

Vincent Grady: Great. "If an address list had multiple occupants, does the beneficiary data have to be modified each time?"

Janine Cuneo: My assumption here when I say multiple occupants it's not just a large family, but that that house has turned over. For example, that someone leased it for six months and now there's another household that's in there and a new lease has been executed. And so I'm assuming that that is what this conversation is and that information is. And so they're asking and wondering, do they have to modify the data each time? And so that's the question I'd pose to HUD is my understanding is no, I want to verify that.

Ryan Flanery: No. You're meeting your national objective with your initial occupant. You know, however, there is the whole if there is an affordability restriction then you do have to maintain that record entirely and report on that in the DRGR in the long-term. But no, the beneficiary data is only entered the one time upon initial occupancy.

Janine Cuneo: Okay. Unless something really drastic happens with some affordability methodology then you should be in the clear. Next question.

Vincent Grady: Great. So with rental addresses with multiple units, for an example, 1234 through 1236 Main Street the system will not validate. How do we address that?

Ryan Flanery: Just don't report each individual unit. That's too much reporting. That's a lot of work. The way that we handle that, actually is we associate the activity and this is one of the reasons why multifamily activities are supposed to be broken out individually. But we're able to on the backend associate a multifamily address. So let's say it's 123 Main Street that has 100 units as opposed to you writing out 123 Main Street, units 1 through 100 in the system we associate the number of households that have benefited as part of that activity with that address.

So it would show 123 Main Street with 100 units. So we're actually pulling data from the beneficiary data and associating that with an address, which we don't do for really any other activity. So save yourself the reporting trouble, don't report each one.

John Laswick: This doesn't work for the mailman, but it works for us.

Ryan Flanery: Yeah. It works just fine.

Vincent Grady: Great. So that is all the questions in the queue and I have reviewed, there isn't any on the phone. So if you have any last minute questions now is your time to get them in the queue. Janine, is there anything else you wanted to mention?

Janine Cuneo: No. The one other thing I am seeing that someone was asking if there's going to be any additional training to go over in more detail, that suborganization feature. We mentioned that that is one of the items, there's, again, four fact sheets that came out in 7.7 and two we really didn't go into in-depth. One was a subordinate grantees feature. The other was tracking expenditures.

The tracking expenditure feature is really for disaster grantees, specifically, actually the most recent appropriation that deals with disasters, including Sandy. And then the other fact sheet that came out, 7.7 was subordinate grantees. I think we probably went in-depth as much as we're going to go. If you're a grantee that's seriously interested in this as a larger grant to a state I would not hesitate in reading through that fact sheet in-depth and if you have any questions specific to that fact sheet entering them in the Q&A.

Or if you're seriously considering it I highly recommend stopping and requesting TA for that. It might be supportive of you to have someone for a couple hours just to talk through that. I find on

these more complex things that are a little bit meatier as well as new and if you're a larger grantee that means you've got a whole lot of data and you have a whole lot of people in your system that you might want to request TA to talk it through with someone to see, is this good, is this bad, what are the pros and cons, because there's pros and cons to all of this stuff. So it's probably important to do.

Ryan Flanery: If there are specific questions -- I mean, I don't assume that there is going to be a huge outpouring of folks who are trying to utilize this particular function, but if there's something that you need help with, Janine, I think offered a good suggestion with requesting direct TA. We also have the Ask A Question DRGR team. So if you go onto OneCPD Ask A Question or just Google Ask A Question in DRGR and OneCPD you'll be able to submit a question.

And we have some folks who should be able to walk you through if you feel that's not enough after you talk to them. Then I would probably request it to be on-call TA or direct TA. Also, if there are specific questions that you think I might be able to help you out with or Jim might be able to help you out with when it comes to this, in particular, if any Sandy grantees are on we will be happy to talk you through some of that on the disaster recovery side.

This is actually an NSP-focused training. So that's why we'll handle disaster recovery questions related to the subordinate users ourselves, but I would recommend anybody who has questions to go to AAQ and/or request TA.

Jim Yerdon: And we're developing a new category of assistance called DRGR therapy. So you could just call in and somebody will --

Ryan Flanery: I already provided that. Actually, I make sure that everybody in the classes that I teach gets a big hug before they leave. So I think --

Jim Yerdon: That's so [inaudible].

Ryan Flanery: -- good marks on the reviews.

John Laswick: Well, we go the extra mile.

Janine Cuneo: Any more questions come in either by queue or by phone?

Vincent Grady: Yeah. Actually, a few. There was a follow up on the demolition question. On validating addresses in QPR I am given 0 percent validation, because the property is demolished and no longer listed. Do I accept this as 0 percent in the system?

Ryan Flanery: That's fine. I mean, if you know -- the validation is an internal check. It's not something that we look at. We don't assign a validity test to your addresses. There are plenty of situations where the address will not come up as validated even though you know very well that it's a correct address. Another example would be if there's a new development and just hasn't been updated in our database. So we use a combination of postal service data with a few other

sources. So it's not perfect. If it comes up as zero, but you know it's correct then you can just move forward with it and accept it.

Janine Cuneo: Great. Thank you. I think we have another -- this actually goes back to an earlier question. Someone wanted to let us know that there has been some guidance via the Ask A Question system that they are suggesting to enter an address for each unit for multifamily projects. So for example, if it's a complex with 50 units there should be 50 individual addresses. And so they want to just let us know that the help desk has provided that guidance.

We will obviously provide different guidance here. So we'll try our best to go back through the help desk and do some polls to make sure that that guidance corrected as well as we'll make sure our [inaudible] that are answering questions are aware of that. And thank you for bringing that to our attention.

Anything else, Vinnie?

Vincent Grady: There was an additional question. Will there be training sites for the new update?

Janine Cuneo: Oh, Jim and Ryan, are you planning to open any DRGR training sites for these new updates?

Ryan Flanery: Training sites, in-person trainings?

Janine Cuneo: That may be a question that [inaudible].

Ryan Flanery: If John and David want to fund our travel we'll do it.

John Laswick: We're out of money, man.

Ryan Flanery: Oh, darn it. You know, we have one training coming up for recent disaster grantees. Aside from that, I don't know of any other trainings.

Jim Yerdon: We could [inaudible].

Ryan Flanery: We could talk about it. I would say if you have a desire then express that desire. That would probably help us, give us reason, we can convince David and John to send us on out there. Make sure it's in Hawaii.

Janine Cuneo: There are some of you that are making it attractive here.

Ryan Flanery: No. I mean, I think we'd be more than willing to go out and teach a couple more classes.

John Laswick: Yeah. It's a little difficult, though, because the effectiveness of these classes, if anybody's taken one, knows the hands-on aspect, which limits you to 25 or 30 people per class.

And so it's kind of hard to launch a training effort if we're out doing 10 or 12 sessions and that's pretty demanding.

Ryan Flanery: We could probably pull off five or six.

John Laswick: Yeah. I think we'd do it to the providers. We do not have -- the way our funding was setup in the legislation, we have pretty much run out of salary and expense funding for NSP. So this is the reason that we lost some of these term employees, the temporary hires that we brought on several years ago and why we have -- those funds lapsed and we do still have technical assistance funding, though and it may be possible through the TA providers or something to generate some courses.

Janine Cuneo: It sounds like we have one vote for someone for courses on some of the new updates. And I think for this person in particular, since there's nothing pending right now and no guarantee for anything coming in the near future of you want someone to hand-hold you and walk you through anything again. You can write a question in the TA. If you have some specific questions about any of those, though you can also connect with the Q&A.

Vincent Grady: Great. So at this moment there are no additional questions in the queue.

Janine Cuneo: Well, it looks like we're probably at the witching hour. We've been at this for an hour and 45 minutes, which is a long time for anybody to listen to and talk about DRGR. Ryan, Jim or John, anything additional we've missed here? Any additional updates or items that are coming up in the NSP world that you want to make sure we advertise?

John Laswick: Well, I guess when you're talking about training we will have a couple of forms that go along with the post-closeout world that are connected to this and we've been working with Jim and Ryan, the continued affordability one being probably the biggest. There's also going to be a land bank form that you will upload into DRGR. And so once we get those together, and we're working on them now, we'll probably be doing some training later in the spring as people start moving into the closeout phase of the grant.

But I think the thing to keep in mind is you're not ready to closeout until you've spent all your money, all your original grant funds that have a line of credit, you've made a national objective and you've met your 25 percent low-income set aside. You may have spent all your money, but until you get all your houses occupied you're not ready for closeout.

Ryan Flanery: On the DRGR side I would just say, and Jim can attest to this, we've been in a lot of meetings recently, design meetings, requirement meetings and basically just going over what DRGR is going to look like over the course of the next six months to a year. We have a lot of things that we're working on. We're trying to get as much of it included as possible. So if you're somebody who uses DRGR just keep your eyes and ears open. We will send out the fact sheets. We always look for willing testers.

And so if we send out a request for testers and you are a DRGR guru locally then we would definitely appreciate your assistance in testing. And again, keep your eyes and ears open for the new functionalities as they come along. Hopefully it'll help you all out.

John Laswick: One more thing, Janine, is that we have a listserv coming out and we've mentioned this on a couple of webinars over the last month and that is that when you are reporting accomplishments HUD only looks at four categories for those accomplishments. And those four categories are clearance demolition, homeownership assistance, which would be the down payment assistance that you give a grant for somebody to buy a house and then the two categories of direct housing, rehabilitation and reconstruction.

So if you have completed all your projects and all your activities and you thought that quite logically disposition was the last thing you did, so you should report those at disposition then we don't see those. And so you don't have to back anything out of disposition, you just have to add those units to the rehabilitation or the new construction. But just keep in mind, we do quarterly reports and we track this stuff pretty carefully, actually.

And under these accomplishments, that's where the money is. We've got over 60,000 of the 100,000 units completed so far, but the last 40,000 are all housing units. So it's all now we're getting families in. So please remember, you've got four categories. If you're not reporting your completed activity in demolition, homeownership assistance, rehab or new construction then we don't see it. And so just add it.

Ryan Flanery: If you have questions about how to add it I would work through the AAQ system. They are all up to date on the different methods to get that data in the system so that we can count your units.

Janine Cuneo: Great. So finally, I just want to show people the resources link. I want to put a final thought out here that as many people know and have seen most of the stuff on HUDNSPhelp.info, the NSP resource exchange or you get redirected to OneCPD. That website on NSP will be closing down probably before the end of the year.

So please start getting even more and more familiar with OneCPD, go to the training events and courses and really seeking into that, because you'll be getting, if not most all of your information from that resource exchange going forward from not just NSP, but for other programs as well.

And then actually, Vinnie, can you tell us how to [inaudible] for the survey?

Vincent Grady: Sure. So we provided a feedback survey in the slides, this link you see here. Also, tomorrow we'll send out a thank you for joining e-mail, which will include this link as well so we do encourage your feedback. It's really helpful for any questions you might have outstanding or any additional topics you still want us to cover in these webinars. So it's really helpful and we encourage you to do it.

Janine Cuneo: Great. So everyone, please go to that survey. Not [inaudible], but also what featured items you'd like to see [inaudible] look at those.

And thanks, everyone. Good luck with understanding these new updates. Any questions, concerns don't hesitate to ask and ask a question and/or if you have any deeper needs go ahead and request TA. Have a good afternoon and evening to everyone out there and happy holidays too if you guys don't hear my voice before then. Take care.

Ryan Flanery: Thanks, Janine.

John Laswick: Bye.

Janine Cuneo: Thank you, guys.