



U.S. Department of Housing and Urban Development

# **DRGR WEBINAR:**

## **Managing Flags and Using Review Tools**

November 9, 2017

Community Planning and Development

# Today's Presenters

## HUD:

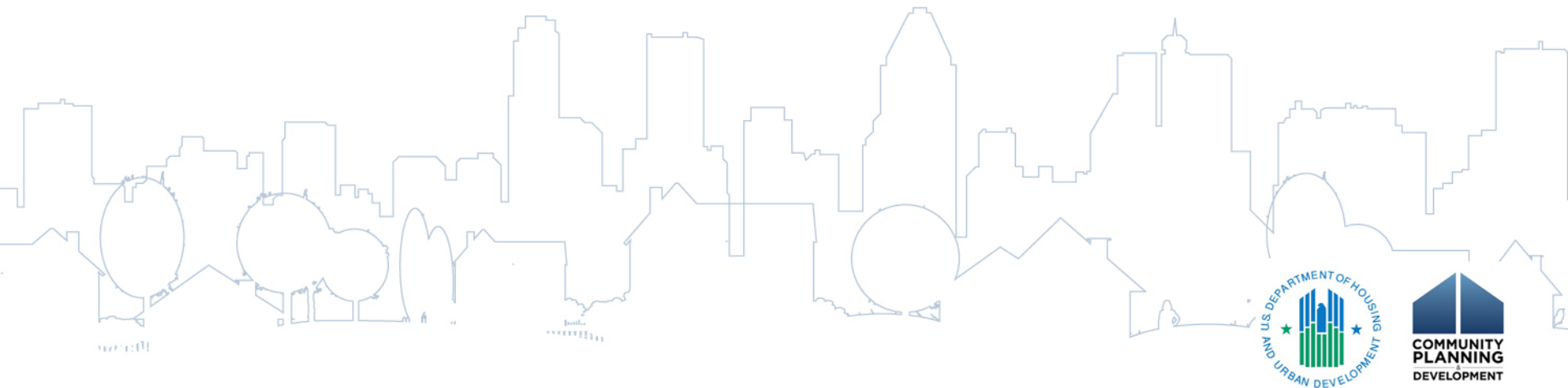
- Njeri Santana, Neighborhood Stabilization Program
- Tyler Bridges, Disaster Recovery and Special Issues

## TDA

- Jennifer Alpha

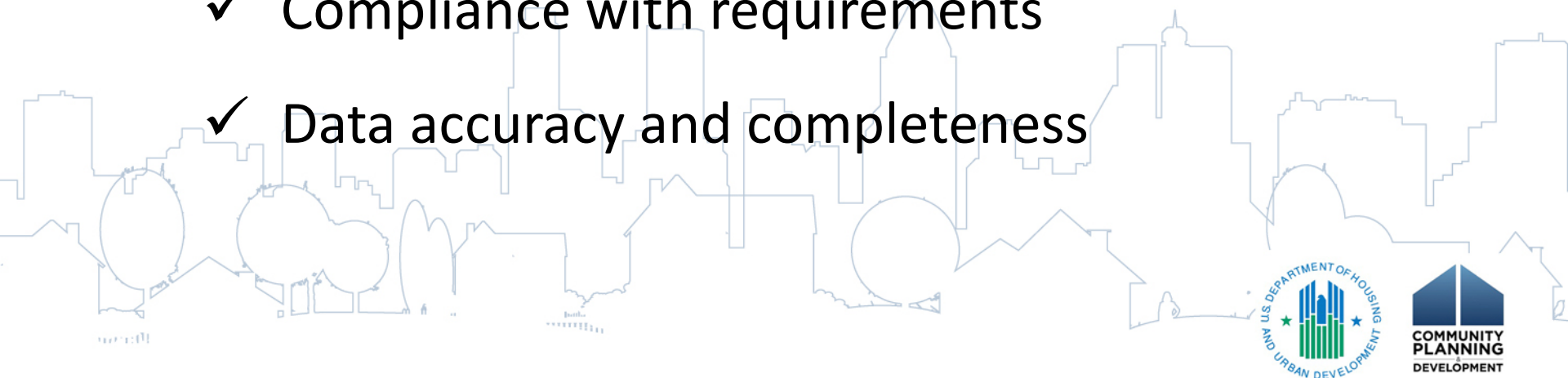
# Agenda

- Overview of Review Tools
  - ✓ Flags
  - ✓ Checklists
- Resources
- Live Demonstration



# Review Tools

- DRGR 7.13 was released in May 2017
- Included new Review Tools to aid grantees and CPD reps with:
  - ✓ Grant management and oversight
  - ✓ Compliance with requirements
  - ✓ Data accuracy and completeness



# Review Tools

- DRGR Release 7.13 included:
  - ✓ New Home Screen and Action Item List
  - ✓ Action Plan compare versions
  - ✓ Flags
  - ✓ Enhanced review checklists
- Today will focus on Flags and Checklists



# DRGR Flag Overview

- DRGR scans and flags items similar to IDIS
- DRGR Flags:
  - Cover a wide range of items, conditions, and criteria
  - Apply to projects, activities, Action Plans, QPRs, or Grants
- DRGR Flags may be generated if:
  - Project/funding delays or concerns exist
  - HUD-specified compliance criteria not met (e.g. national objective not met)
  - Basic data clean-up necessary (e.g. missing performance measures)



# DRGR Flags ARE:

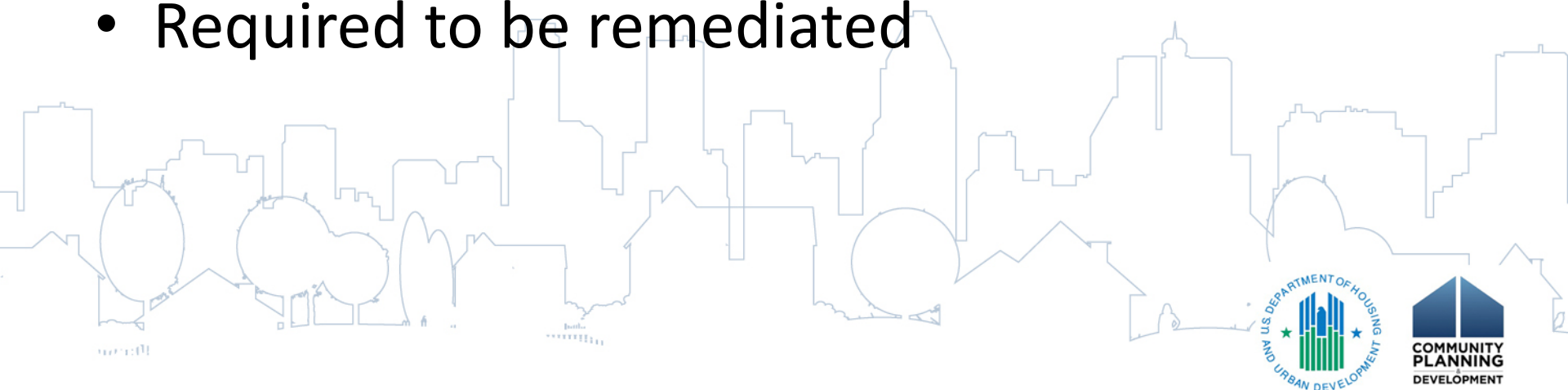
- Meant to help grantees and CPD reps
- Meant to be resolved rather than remediated
- Required to be resolved in a timely manner, and by close-out
- Configurable: HUD can add, edit, remove flags at any time without a release
- Automatically generated on a predefined schedule (e.g., daily, weekly, etc.)





# DRGR Flag ARE NOT:

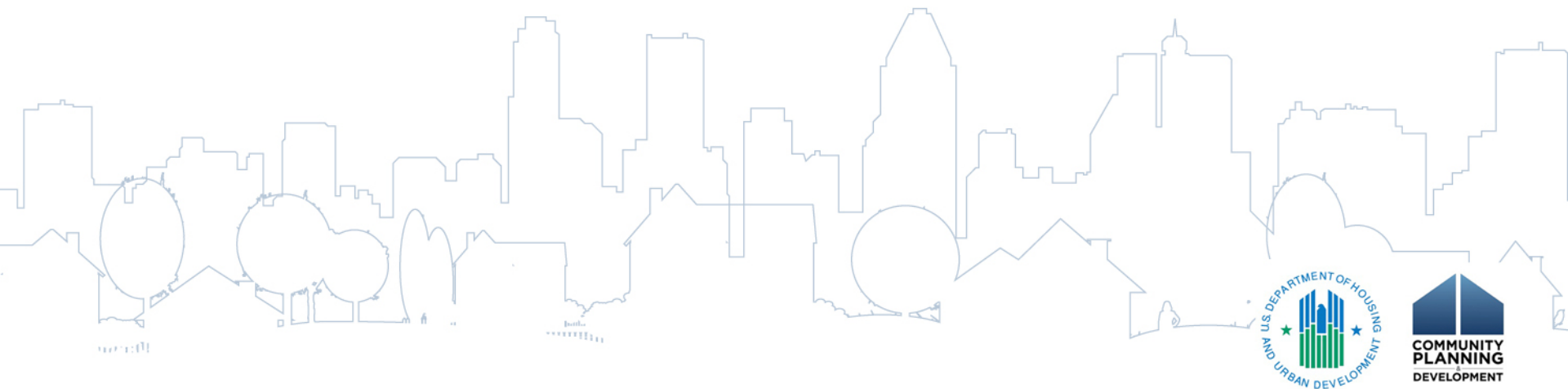
- Required to be resolved in order to submit or approve:
  - Action Plans
  - QPRs
  - Vouchers
- Required to be remediated





# DRGR Flags SHOULD:

- Grantees: Be resolved or remediated, at minimum, with each Action Plan or QPR submission
- CPD reps: Be reviewed, at minimum, with each Action Plan and QPR review



# DRGR and IDIS Flag Differences

	IDIS	DRGR
Basic Flag Workflow	Remediated then resolved	Most resolvable w/o remediation
Remediation comments including deadlines	Required (Remediation Plan)	Recommended
CPD rep approval of Remediation Plan	Required	N/A
Must be addressed in a timely manner	Yes	Yes
Requires a release to add, edit, remove	Yes	No
Include flags for at-risk, general compliance, and data clean-up	No	Yes

# DRGR Flag Workflow

## Item is Flagged

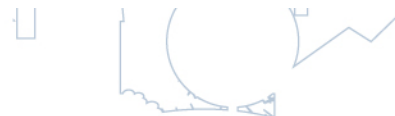
- A condition occurs in DRGR that causes a flag to be created.
- The Flag has a status of Active and can be found in a search.
- A count of active flags will appear in the to-do list under My Action Items of the Home Screen.

## Flag is Managed

- Grantee User takes action to resolve the flag.
- Remediation Comments may be entered by Grantee for flags that are not resolved.
- HUD may enter comments via Action Plan or QPR Review Screens.

## Flag is Resolved

- When flag is resolved, the flag status will update automatically (usually daily or weekly).
- Grantee users can update the Flag status immediately through the FLAGS option of the Home Screen.



# DRGR Flag Access

## Grantee Users

### Home Screen

- Searching and Viewing Flags
- Managing Flags
  - Resolving “Active” Flags
  - Updating Flag status
  - Remediating “Active” Flags

### Action Plan & QPR Review Screens

- Reviewing “Active” Flags

## HUD Users

### Home Screen

- Searching and Viewing Flags

### Action Plan & QPR Review Screens

- Reviewing “Active” Flags
- Comment on “Active” Flags



# Current Flags and Guidance

- 10 current flags
- <https://www.hudexchange.info/resources/documents/DRGR-Flag-Guidance.pdf>

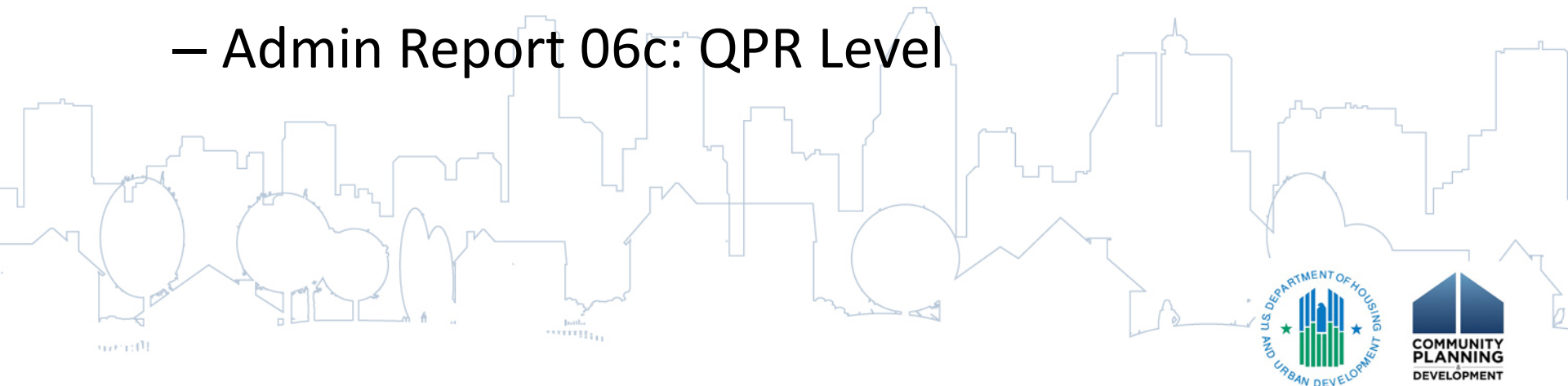
Flags: Disaster Recovery and Grant Reporting (DRGR) System

Version 1.0 | Released September 25, 2017

#	Flag	Program	Flag Level	Condition	Grantee Action	HUD Action
1	Activity end date passed but activity not completed	CDBG-DR NSP	Action Plan – Activity	Activity with <u>Activity Status</u> of <u>Underway</u> has a <u>Projected Activity End Date</u> that has passed.	<ol style="list-style-type: none"><li>1. Edit <u>Projected Activity End Date</u> to reflect new date the activity is expected to be completed; and</li><li>2. Enter <u>Action Plan Submission Comments</u> to explain reason for the delay;</li></ol> Or <ol style="list-style-type: none"><li>3. Change the <u>Activity Status</u> to <u>Complete</u>, if appropriate.</li></ol>	<ol style="list-style-type: none"><li>1. Review action taken and reasons for delay.</li><li>2. Work with grantee to ensure timely expenditure of funds.</li></ol>
2	Activity underway with no drawdowns in 180 days	CDBG-DR NSP	Action Plan – Activity	Activity with <u>Activity Status</u> of <u>Underway</u> , and: <ol style="list-style-type: none"><li>1. Has at least one <u>Drawdown</u>;</li><li>2. Is not fully drawn; and</li><li>3. No additional <u>Drawdowns</u> within the last 180 days.</li></ol>	<ol style="list-style-type: none"><li>1. Reduce <u>Activity Budget</u> to match <u>Drawdowns</u> if no additional <u>Drawdowns</u> will be made;</li></ol> Or <ol style="list-style-type: none"><li>2. Create a <u>Drawdown</u> if an eligible expenditure exists; and enter <u>QPR Submission Comments</u> to explain reason for the delay;</li></ol>	<ol style="list-style-type: none"><li>1. Review action taken and reasons for delay.</li><li>2. Work with grantee to ensure timely expenditure of funds.</li></ol>

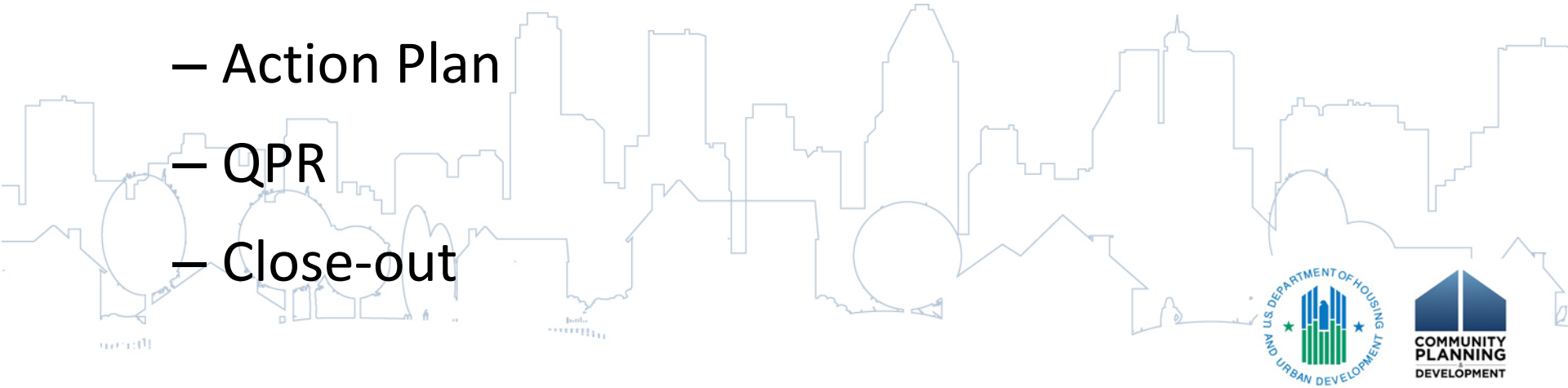
# DRGR Flag Reports

- Use to track or troubleshoot active flags
- Flag reports include:
  - Admin Report 06a: Activity Level
  - Admin Report 06b: Grant Level
  - Admin Report 06c: QPR Level



# Review Checklists

- Review checklists now contain auto-computed answers
  - Applies only to questions that are data-driven
  - Configurable
- Checklists include:
  - Action Plan
  - QPR
  - Close-out





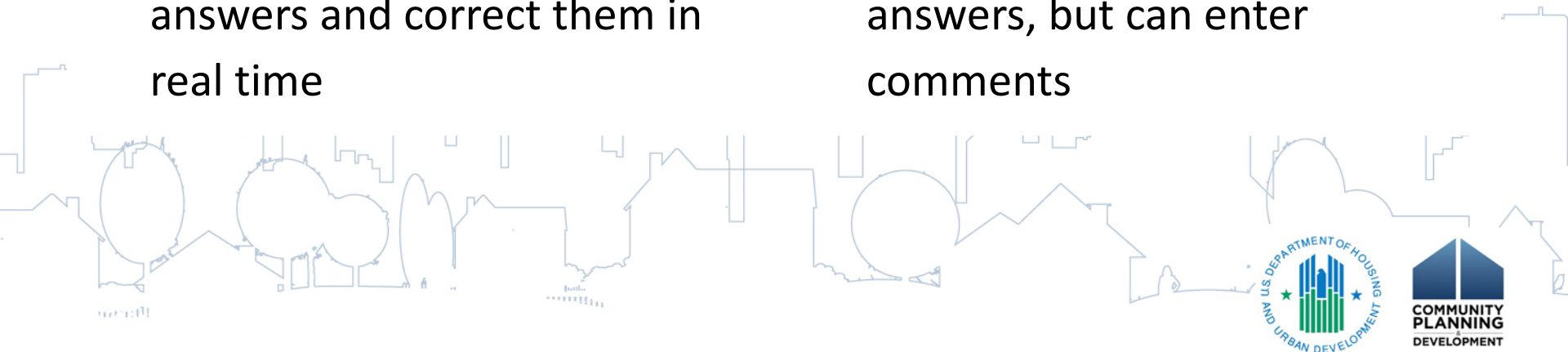
# Checklist Access

## Grantee Users

- Accessible from Review Tools
- Should use as a quality check prior to Action Plan or QPR submission
- Can view auto-generated answers and correct them in real time

## HUD Users

- Accessible from HUD Review Screens
- Should use during Action Plan and QPR review
- Cannot change auto-generated answers, but can enter comments



# Resources

- HUD Exchange  
<https://www.hudexchange.info/programs/drgr/>
- User Manual  
<https://www.hudexchange.info/programs/drgr/guides/#drgr-user-manual>
- Fact Sheets  
<https://www.hudexchange.info/programs/drgr/releases/>
- Ask A Question  
<https://www.hudexchange.info/program-support/my-question/>



# Questions?



# Live Demo

