Recovery Housing Webinar Series

DRGR for RHP Grantees

Wednesday, July 14, 2021

Carrie Kronberg: Thank you, Paul. Good morning. Good afternoon, everyone, depending on where you are and welcome to the Recovery Housing Program, DRGR webinar. I'll quickly go over the agenda. As the title suggests, today we're going to focus on DRGR. In just a moment, I'll introduce our speakers and review what we hope you get out of the training today. And then we'll do a quick framing of the Recovery Housing Program itself. The intent of the action plan.

Then we'll talk about how to set yourself up for success in DRGR, what you need to do on the front end. And then we'll get into the real meat of how to go access DRGR to enter your action plan, how to structure and enter projects and activities, fund obligations, and prepare to fund draws. And then of course, do your performance reporting.

I will introduce our panelists. We're joined today by Chuck Kreiman, who's a state and CDBG-DR subject matter expert with ICF. And he'll kick off the content of our webinar today. We're also pleased to be joined by Onye Ibeh, he's from the ICF Disaster Management Team and a resident DRGR expert. He'll walk us through all of the sections on how to use DRGR, including screenshots and some good guidance.

And I'm Carrie Kronberg also with ICF and recently was a state and entitlement CDBG grantee. That was an in the not too distant past. Today's learning objectives. After this webinar, you should understand how to complete the early steps to use the DRGR system for Recovery Housing Program implementation. Use DRGR to enter and submit your Recovery Housing Program action plan to HUD. You should understand how to obligate funds and create draws in DRGR, and also know what you need to do to accurately complete your DRGR performance reports.

Okay. We'll just do a quick framing overview of the Support Act and the Recovery Housing Program itself. The Recovery Housing Program came out of the Support for Patients and Communities Act, which was signed into law in 2018. When it was authorized, it wasn't funded. So the initial funding came a year later or so, but the authorization established the Recovery Housing Program as a response to the opioid epidemic, and specifically to meet the need -- to provide housing for individuals in recovery from a substance abuse disorder.

States and the District of Columbia are eligible. And the program framework is based on the CDBG program specifically for states and then adjustments to that regular state CDBG program requirements as necessary to implement the program are detailed in the Recovery Housing Program notices. So, as I mentioned, funding came a little bit after authorization. In fiscal year 2020's budget, Congress appropriated 25 million to the Recovery Housing Program. And from that funding, 25 grantees received an allocation.

In 2021 budget, Congress appropriated a second round, same amount. And that year's funding supported 27 allocations. And eligibility is based on overdose deaths mortality rates, and in 2020's budget it was based on 2016 data in 2021's budget, 2018 data, so that's why the number of grantees are different.

And then the allocation formula that determines how much folks get includes unemployment rates, labor force non-participation, and that the age adjusted rate of drug overdose death. So program rules and waivers for the first allocation came out in November of last year. And then the round two funding notice has been -- the pre-notice has been published. That came out in late June, but hasn't yet been published in the Federal Register Notice, so it's not on the slide. But the intended requirements are available.

The Recovery Housing Action Plan is served as your application for funds. It's based on CDBG requirements as modified by the support act statute and those implementation notices. The action plan tells HUD the basic information on recovery housing needs in your state, as well as the process for deciding how you'll use those recovery housing funds.

And then of course, other elements address your administrative requirements and expected outcomes, how you want to measure performance or are there are some required performance measures that you're encouraged to add additional measures for your community. And then you also have to discuss partner coordination and management, as well as oversight of your funded activities. And you, of course, use the DRGR system to enter your action plan and do all of the administrative pieces for your grants and communicate with HUD with your performance reporting.

Okay. Now I'm going to turn it over to Chuck and he's going to talk about how to get ready to use DRGR, set yourself up for success.

Chuck Kreiman: Good afternoon. So we're going to start this section of the webinar with a poll question. We have three possible responses, and I guess, Paul, you manage this?

Paul: I can. Go ahead, now open and select -- please select one response. And once you selected that response, you can hit the submit button after you select the response. So that way your answer will be counted in the tally. You have to hit that submit button. We'll share the results now.

Chuck Kreiman: All right. I think that's fairly encouraging. What we've seen is that there's only one person -- one of the attendees who has tried, but not succeeded in entering the system. So that's promising. So most of you who have tried, have been able to succeed. And why have you succeeded? That's because you have a up-to-date user and the whole start of the process is in your jurisdiction.

You have at least two users, and those of you who have been working in DRGR perhaps because you have a disaster recovery grant, or maybe you're still finishing up your neighborhood stabilization program grant. You have existing people who have some comfort level with DRGR and are active users.

There are two levels of user. You have at the top of the pyramid, so to speak, an administrator who receives his or her authority or their authority from their CPD rep, everything is sort of hierarchical in DRGR. Your HUD field staff is the entity that authorizes your administrator.

Your administrator then authorizes the next tier of your users in DRGR as referred to as a General User.

We have most of our participants with two grants and the way HUD is set this up and look at the second notice that is available on the HUD exchange to get information about this. But in general, HUD is consolidating the two grants that are available currently for any jurisdiction that has received two grants. And that's most of you. Will have a parent grant so that your action plan will relate to that combined two years of grant funds. We'll avoid you having to repeat some of the action grant narrative material.

Each separate fiscal year grant will be referred to as a child grant. I'm not sure who came up with that nomenclature, but that's the way DRGR has been designed and designated. So you'll have an overall parent grants and each fiscal year will be a child grant. And of course, one of the processes that to get started in DRGR is the active administrator will associate the user to the grants that they have to work on. And so that's a task that needs to be completed.

For a handful of you who will receive only one grant, you will see that single grant when you start to attempt to use DRGR for your RHP application. That will come up as a single grant if you're FY20 only, or a couple who are fiscal year 21 funds only. And your administrator will associate the user staff with the appropriate grant.

The plan for the future as the second notice indicates is that all future grants will then become amendments to this initial RHP grant. So that will work for FY2021. There is at least in the proposed budget, FY22 funding. I'm not sure how that's going to work by the time we get to seven or eight years down the road. But we'll see. For now, we know that we're going to have a grant with each additional grant as an amendment to a consolidated action plan.

So where do you need to be before you actually dig into your DRGR submissions? Well, the process is laid out in the notice, you establish consultations with the people who are involved in substance use disorder and recovery housing in your jurisdiction to evaluate needs and priorities, and look at how you want to use these funds for the housing element of supporting persons with substance use disorder.

And many of you are already, at least conceptually, established a selection process -- some type of outreach, some type of selection procedure with one jurisdiction that has a process that included a point system, a total of 100 points that they'll solicit proposals and score them and make selections of what the funds will actually be used for.

So we're going to repeat this issue about project inactivity structure a couple of times through the course of this, because this is key to get anything set up correctly and being able to process all of the funding. The performance measures and eventual reporting, and everything will flow from this structure of your project and activity.

And these terms have very specific meanings in DRGR. Projects are an upper level category, a broad category. One category might be for example, acquisition and rehabilitation of multi-family properties for recovery housing or another category might be new construction of recovery housing facilities. So those are broad level categories. And within that category that you established, that makes sense for your program and your jurisdiction, you will have individual activities set up under each of those broad project categories.

Just one other thing, as we'll point out, every year you will have one project as your administration and technical assistance project. And that will be the way in which you will set up and draw down your administration. And if you choose technical assistance, you will choose your technical assistant -- you'll fund your technical assistance activities that way as well. Once you are set up and everything, all your narratives refer to the notice, gives you a list and remarkably, perhaps not remarkably, when you get into DRGR, as we'll see shortly, when you get into your action plan, each of the headings that are required by the notice appear for you to enter on your DRGR submission.

So all the narratives are set up for you to follow through and explain to HUD, how you've done each part of the process. Once that's proved at the project level, just we'll clarify it again this repeatedly, your submission to HUD for approval -- you will need to complete all of your broad project categories and provide a budget for those.

You do not need to submit your activities at this point, but it's desired and preferable if you do. And the point to emphasize here is until you have activity specific entry with the appropriate project, you will not be able to draw your funds. All fund draws are against an activity, not at the project level, but at the activity level.

I'll just mention that for all of these processes and ensuring that you have the appropriate users from the administrator to the general user, there are quite a few resources out there. Everything is online in the HUD exchange. Chapter five of the DRGR resource manual is very clear. There's links to the online help desk AAQ feature. And of course your field office rep probably, as I use the term overworked and under appreciated. But I think they will be able to help you out as you come across any obstacles to that process.

Now, the various DRGR roles. We're going to focus on submitting and approving action plans today, but the roles also apply to the drawdowns and vouchers and submitting reports. And again, keeping in mind the conceptual process of the grantee administrator and then the general user, so to speak, the boss and the work horse, as you might want to term it. One of the point I'll mention, this -- we are in the period of user recertification.

So if you've been in the system and you're -- this is the point where actually it was at during the previous month during June, when you were up for recertification. So the administrator gets re-certified by your HUD field office was the next level up, your general users, and anyone who's an administrator will re-certify your general users in your jurisdiction.

So as was mentioned, just to give you a graphic illustration. In a traditional single grant set up, as you see on the left-hand side of the grant, you'll have a single grant and a traditional action plan. In the system we're setting up for the Recovery Housing Program, it will be a consolidated action plan, and that will have a parent grant designation that you will use in the DRGR process, but you will still have separate specific grants each in this case, FY20 and FY21 grants identified.

And as you go through the process of setting up projects, which we'll illustrate shortly, you will be selecting which grant the project is associated with. Which project will fund that -- which grant will fund that particular project and then you'll carry through and fund the activity from that grant. So here again, we illustrate the action plan.

In this case, for most of you will be a consolidated action plan with covering two fiscal years of grant. You will set up projects, one of which will be admin and technical assistance. And within each project you'll have one or more activities. And again, conceptually come up with a allocation of your approach to recovery housing that fits an appropriate category and a group of categories. If you're doing, if everything is, for example, acquisition and rehabilitation of existing housing or existing single-family housing for recovery housing purposes.

You may only have one project in addition to it administration and technical assistance. And with the amount of funding, you may do two, three, four activities under that general project category. So however you choose to rationally divide your activity types into broad project categories, that you should set that up in a way that works for you.

So some last rules that you need to keep in mind at the action plan level, you will have your grantor award amount. Program income, it's hard to conceive a very many situations where your Recovery Housing Program will have program income. One I can think of off hand is if you acquire a piece of property initially, and then upon completion, you may find that there's some excess portions of the property that weren't necessary when the project is completed. You may sell off that remnant say to an adjacent property owner. So you may have some programming income in that regard.

Don't think that any revolving loan funds will be applicable in our context. So you have an overall budget to work with and some of the technical assistance fact sheets indicate, you might think of this as a series of Russian dolls where each one fits within the other, the total of your project budgets has to be within your grant budget and you can't exceed that.

And once you get to the project, the sum of your activities must fit within the project budget. If you need to make adjustments, you can amend project budgets, but again, you're still limited by the overall action plan level budget. Let's use it. There is an ability to move things around, and if you find it an activity to needs an amendment, you may need to move some funds from another project to accommodate the budget for that activity.

So finally, I want to share some advice with you. Finding is that Google Chrome is the browser that works best with DRGR. And that when you navigate, there's a process of selecting each function, whether it's action, plan management, finance, managing your dollars, reports, whatever, you need to select that functionally and to not use the back function on your browser.

If you have -- you're distracted and you have an emergency come up and you need to be away from the system, if you let it sit idle for more than 20 minutes, it will lock you out and then you'll have to wait, I believe it's 30 minutes before you can get back in. And then when you're completed, when your DRGR session is completed, you should log out. There's a log out under your user profile tab. You don't just close out your browser, functionally log out.

Which raised the point that you don't need to submit your whole action plan and be all ready in one session. You can enter these as you have time, if you've got a lot at 20, 30 minutes at one point in the day to do your RHP initial entry need to come back and complete it two or three other sessions, make sure you save. Always make sure you save and then log out of your browser.

One other point I noticed, I saw the recommended that when you're moving texts and a lot of your DRGR narratives will be texts that you may have already prepared. It works more effectively if you save it and move the narrative material in from a text file. I'm not sure how much difficulty, if you have trying to move it from a Word file, but that is the recommended way to enter text.

And you'll find that and some other hints in chapter two of your DRGR manual. And of course you want to have that DRGR manual and the online HUD exchange material bookmarked on your browser. And that is the remainder of my presentation.

And I need to turn it over to Onye at this point. And Paul, do I need to X out in the poll? Is that what I need to do?

Paul: Yes. He can X out of the poll now and presenter [inaudible] now.

Ndubuisi Ibeh: Hey everyone. Thanks Carrie. Thanks Chuck. Hope everyone's doing well. So now I'm going to get into DRGR and basically give you guys hopefully a robust, thorough overview of how to get into DRGR, how to navigate around DRGR, and make sure that you guys -- as you guys are developing your RHP action plans, you guys are able to set up your grant properly in the system going forward.

So the first thing I just wanted to touch on with respect to DRGR is that you want to make sure that you have your username and password, that your system administrator has set you up to go to be able to access the system, and that you have a profile and everything has been certified; right? As Chuck said earlier, Chrome is going to be your best bet for being able to access the system.

I do know that sometimes DRGR can get a little bit buggy. So maybe if Chrome doesn't work, you can try Edge or any other browsers, but typically Chrome is preferred, but if you guys are experiencing issues, don't hesitate to contact your system admin or HUD to let them know.

So on the screen here, what you're seeing on the left side is basically what the login screen would look like for you guys to get into DRGR. And then the right hand side is what you see once you're able to log in. This is going to be your main homepage, which we'll get into if you're on the presentation.

All right. So basically what this is, is what the action plan screen looks like in DRGR. You guys are going to be dealing with multiple appropriations. So one thing I just wanted to point out here is that when you guys are looking at your action plan, you're going to notice that you can have what you call the grant number.

This number is going to be your parent grant number. I think Chuck was mentioning this earlier. But as you guys get your different appropriations, you're going to have what we call the child grant numbers. So on the screen here, you'll see the number one is basically telling you where your parent number can be found.

And then in the financial section where we see the number two, you'll see where we begin to sort of distinguish between the parent and child relationship. So while you have your parent grant, each of your appropriations for 20 and 21 are going to have your own specific child grant number. We'll get into that specifically later on once we're in DRGR.

Okay. So when you guys are managing your action plan and setting yourselves up, Chuck touched on this earlier as well. You always want to make sure that you are allocating your budget appropriately. So obviously you're going to have two appropriations which adds up to your total RHP grant amounts. This then is going to break down into specific project budgets that will cover your direct programs, your admin, and any TA that you may or may not do; right?

And as you guys are allocating your funding down, you always want to make sure that you are adhering to the RHP notice, which does state that there's a five percent cap on your admin funding, and there's a three percent cap on your technical assistance; right? And then once you've allocated your admin and TA, [talking in background, inaudible] anything that you have remaining will then go to your direct RHP projects.

So as I was saying, we don't expect any program income, just based on the type of programs you guys are potentially going to be running. So you should not worry about this, but obviously, if it does come up, just reach out to your HUD rep to help you getting that information in there. And we also don't expect any revolving loan funds to be applicable to this grant as well. So really it should be really simple in terms of setting this up. You really have to worry about what programs you're running and how much are we allocating for your admin and your technical assistance?

Okay. Now, in terms of admin and technical assistance, one of the questions that you're probably going to run into is how do we set up our projects in relation to our activities; right? So here, we just wanted to basically let you know that you do have flexibility in terms of how you want to set it up based on your program. You can either opt to create one project for both your admin and technical assistance activities, or you can create separate projects -- one project for admin and another project for your technical assistance for each fiscal year award.

So just, again, there's no preferred method. It really just depends on what makes it easier for you. But depending on a number of programs, you guys are running, it may make sense to try as best as possible to consolidate your projects just so you're not having to track multiple projects. A lot of times it can get very cumbersome and especially for dealing with a lot of activities. So you always want to think about how can we simplify this while also capturing as much information that is relevant for HUD and for the public.

All right. So just wanted to dive a little deeper into this concept between how do we structure our projects and activities? So basically on this slide, what we're pointing out for you guys is that if you can look at the examples in the right, a grantee, you guys can have the option of either doing two things. One is you can create one project that again, covers both your admin and your TA for your fiscal year 20 funds; right? And then under that project, you can have two activities; right?

One activity for admin, for FY20, and one activity for technical assistance for FY20. But with activities will live under this one project that covers all your FY20 admin and TA, or you may choose to say, well, no, I want to do it a different way where I just have a very simple project that covers admin and TA generally. And then you'll have four activities under that, that covers your two admin and TA for FY20 and another two for your admin TA for FY21. So again, either option works, it just really depends on what works for you and really how many projects and activities do you guys foresee having to create?

Okay. And here's another option for you guys. You may want to consider, for your direct program activities, you may want to consider lumping all your program activities under one project. Here in this example, we have grantee, they create a project for their recovery housing units. And under that project, they have two specific project activities.

One is for what we call the Metro Recovery Housing: Acquisition and Rehab. And then we have another one that's called Western Valley Recovery Housing. So again, if you're dealing with multiple responsible organizations or different types of acquisition activities that are all kind of similar, you can group it onto the same project. So you don't have to create a specific project for each activity.

One way to think about your project is like a bucket of activities; right? So as much as you can consolidate all these or group all these activities into one project, the better it is for you to track it going forward.

Now, another aspect of creating your projects, activities is also creating your responsible organizations in DRGR and responsible organizations just mean who are the entities that are actually responsible for administrating the specific program or doing something in response to the grant using some of the grant funds.

So as you're creating your responsible organizations, you also need to be making sure that you structure your activities according to those organizations. And as such, when you're creating your projects, some grantees may also opt to create projects that track specifically to those organizations. So what do I mean by that?

In this example, you see that the grantee -- they created a project for Metro Recovery Housing, just -- you would assume as the responsible organization. And then, under that project, you have a specific activity for Metro Recovery Housing doing acquisition work. And then the grantee separately has created another project that tracks to the Western Valley Recovery Housing. And under that specific project you have an activity specifically for Western Valley Recovery Housing.

Now you can see the difference from the previous slide. Obviously, the previous slide, both activities are grouped under one project. In this example, there's two separate projects that track the two separate activities. In this case, maybe the grantee, for whatever reason, may want to track it differently and report it out based on their needs. Again, it just really depends on what you need to do.

Chuck Kreiman: Yeah. That previous structure may be more appropriate when you're anticipating that one entity may be undertaking several different activities and that you set up the project bucket as that responsible organization, and then you may have multiple activities under that project.

Ndubuisi Ibeh: Right. Right. Thank you, Chuck. All right. So now, I'm just going to go over a few slides that kind of will gloss over what the screens look like in DRGR and then we'll get into DRGR to actually look at these screens and navigate through them. So the first thing you're going to be looking at creating in your action plan is your projects.

This is the project screen for adding a project. So one of the things that are going to be key for you guys is going to be to add your project number, a title, a description. When it comes to the number in the title, that's really up to you guys in terms of what the number and title should be. If you're doing an acquisition project, I think you saw from the earlier examples, a project name could be acquisition and rehab of property, and the title can also be the same exact thing. I think number can sometimes be a misnomer. Some of the grantees you'll see the number and title are kind of the same -- same exact thing.

And then you have a project description, a very short sentence or two that just says, what is this project supposed to be? Then you're going to have your project status, which is going to give you the option of opening canceled. As you're creating your projects, you'll tag this as open. Because you're essentially opening a project and you're going to be billing against that project as the program progresses. And then you're going to put in your effective date and your end date for the project. And then you're lastly going to put in your budget for the project. And this is really important. I just wanted to flag this as well.

For the consolidated action plans, which is all what you guys are gonna be working with, you're going to going to notice here that you're going to have two budget lines, one for each grant number. So your FY20 and your FY21. So as you're creating your projects, you want to make sure that you know how much of the specific award that you have is going to be going towards each budget line; right? So that's just something to be aware of there.

All right. So we talked about responsible organizations. And this is less important for the projects, but you'll start to notice that it is important for the activity level, because you'll need that to assign who is the responsible for the organization actually administering the specific activity. And you'll notice it as a required entry on the activity screen. So before we get to the activity, one thing you want to do is start to create your responsible organization.

One thing you may notice, especially for some of you that manage other types of HUD grants and have maybe navigated DRGR before, is that you may already have the responsible organizations that you need. So there are reports in DRGR under the reporting function and macro strategy where you can actually go in and run a report that tells you who are my responsible organizations that I have in the system. You should be able to pull the organization, name, the type, the DUNS number, and even the address.

And hopefully if that already exists in the system, you should only require to search for the organization and select them. Now, if those organizations do not exist in the system, then there is a screen in DRGR are under the admin module where you can actually go and you can create responsible organizations.

And like I said, to create an organization, the main things that you'll need is what is the organization's name, the type of organization, whether it's a fed agency. State, local governments or profit or some other type of entity, do they have a DUNS number? And then what is their address for that entity? And then once you have that, you should be able to then create your activity. And essentially this is what the screen looks like in DRGR. As you can see, you have your project as the first field that needs to be filled out.

And again, why do you need to do this? It's because right here, you're making that connection between your project and your activities. So you create your project first, which then allows you to select which project does this new activity fall under? Then you're going to select your activity type. If you look up -- if you remember on the RHP notice, there are several eligible RHP activities. This is where you're going to find them and select them based on the type of program you're running; right?

Then you guys select your national objective. Again, if you remember the national objective for RHP is LMC, so all your activities should be tagged as LMC or Low Mile Clientele. Then you're going to create your grantee activity number and your activity title. This is similar to the project number and project title, but it's going to be different just in terms of best practices, what we typically see is that grantees create some type of nomenclature that could be a combination of the activity type, the action plan program, the responsible organization, maybe even the round of funding, things like that.

So just be thoughtful about how you're creating your activity numbers. Because again, this is how -- this is the number that you're going to use to track where you're drawing your funds down from, and it's also a good communication to HUD about what activities are they looking at. And also when you guys are doing your annual reporting, the public can also understand, okay, I understand what programs the grantee is running and so forth; all right?

And then you're going to have your activity description as well. This can be a few sentences again about what type of activity this is specifically, then you're going to have your activity status. And again, you're going to have your projected start and end dates. Again, make sure that you're start and end dates align or at least correspond to the grant start end dates. That does not need to match, but you don't want your end dates for your activities to be after the official end date of the RSP grants. So just be cognizant of that.

But here's where you enter those dates as well. And then you get and here, we talked about responsible organizations in the previous slide. This is where you're going to have that information put in. And then lastly, for your budget, again, similar to your project, because this is a consolidated action plan, you begin to see the distinction between activity budgets across the two child grants; okay?

Chuck Kreiman: Yeah. When Onye gets to the demonstration, you'll see this more clearly, but be clear about what's a dropdown where you have to make a choice for a project or activity type or national objective, which of course only one choice. And the same thing will be true on responsible organization. You will have to make a choice from a dropdown. So if you're responsible organization is not in the system, it will not appear in the dropdown when you're entering that activity information. So you'll see that during the demonstration that will come shortly.

Ndubuisi Ibeh: So once you've created your projects and your activities, another thing that you'd want to do is also establish how you're entering your performance measures in the system. This is important because again, as you guys are doing your writing your programs, you want to be able to report out on what is it that you're accomplishing? So it's imperative that you report out on what your proposed accomplishments are.

And again, all this information is stuff that should already be in your existing written action plan, as you guys are developing your programs and such, but you just making sure that you're going into the system and you're putting those numbers in. So it could be a combination of the different types of accomplishments; right? But specifically for the RSP grant, you may be reporting out on the number of people that you've served or the number of people that have moved to permanent housing.

Depending on the type of activities you guys are running, certain things might trigger section three, even. So just be cognizant of the type of programs and activities you're running. And if it does trigger things like section three, just make sure that you're reporting out on those sections three accomplishments. So labor hours or number of employees hired and things like that.

Now, when it comes to getting information to DRGR, one thing I'm also going to show you guys, is that you guys can actually use some of HUD's DRGR data templates to get some of this information into the system. Now, this is just my preference, but when I'm learning how to use DRGR, I try to sometimes operate manually. And it's in the sense that I try to get an information there by myself.

But for some of you that may not have the time, it might be helpful using these data templates to be able to populate the information that you need under your projects, activities, and your responsible organization. When we get to the voucher drawdowns as well, you can also use the DRGR data templates to also populate information into DRGR for your drawdowns. But just want to let you guys know that that is an option as well if you guys needed to free up some time and get your information in there.

All right. So now I am going to share my screen and basically go through the live demonstration of DRGR. Just wanted to stop here and ask if anyone has any questions, please enter it into the chat; right? Before I start with the demonstration. Okay. So I'm sharing my screen now. So if you guys remember, this is the homepage for when you log into DRGR, the homepage basically is going to have all the HUD resources that you're going to need. So you're going to have the DRGR user manuals and fact sheets. You can also click this link here to take you to the DRGR page that has all the data templates that I just mentioned.

This is what the data template site looks like so you can see, you have a variety of links. If you click any of these links, you'll download a CSV file that basically allows you to populate information and any of these templates to then upload them into DRGR. You can also find information about upcoming DRGR trainings, and a variety of other information for you. If there are any changes to DRGR, in terms of the system themselves, you'll see announcements from HUD here.

You'll also see your account information up here in terms of who you are and if you've been certified and so forth. If there are any flags in the system that is trying to inform you of things you need to be aware of? You'll see those flags as well here. And then any actions that have occurred within the system in terms of voucher creation or approval or voucher documentation that needs to be uploaded. You'll see those notifications in this section here. So basically this is your main homepage that gives you a cursory review of what's happening within the system.

Okay. So to navigate, I'm just going to do a quick navigation tutorial. Up here is where you'll start to search for your grants; right? So you'll see -- right now I'm in a specific grantee, but here you'll see all the different grants that they're administering. This is where you can go and search for specific grants that you want to search for; okay?

The navigation tool here at the very top, again, you'll see the name of the person whose profile this is. The home button here is what takes you to this home page. The three pillars right here -- I may just squeak -- okay, the three pillars here is what's going to take you to managing your grants. So this three pillars is your management grants module. So under your management grants, this is where you can manage your action plan. This is where you can add projects and edit or search for projects. This is where you can add and search for activities. This is where you can add grantee programs. This is where you can do your performance reports, and this is where you can search for your grants.

This icon here that looks like a little globe, this is if you want to search globally, you can do so. And basically what that means is if you were to go to search projects, you can do a global search where the system will look -- not just specifically within the grant, but can, if you need it to search for a given project across all grants. So we can do a global search across the entire system, if you're not sure what the specific grant is that you're looking for.

So just be aware of that. The search -- that's what this icon means right here; okay? The dollar sign here is your management financials module. This is where you go to actually create your vouchers. This is for drawdown purposes. If you had any program income, this is where you go and create your program income and search for any program income receipts that you've received to date. The scales here -- this is for your compliance. So management compliance, again, this is for managing any flags in the system or searching for flags.

If you've done any monitoring audit or TA events, this is where you'd go to add and report on those events to HUD. And then for reporting functions, I hadn't mentioned earlier about micro strategy. This is where you'd go, click this report link here. And basically you can run reports out DRGR for anything, whether it's progress on your action plan, and progress in your drawdowns, run reports on your responsible organizations and so forth. Any type of reports you need, you can run it from here.

The public data portal -- this will take you to the website where HUD basically shares monthly reports across all grantees on their progress for spending on their grants. We can go to the public data portal and see those reports as well. The crown here -- this is your administration module. This is where your system administrator will go to re-certify your profiles or request new users to be attitude to your DRGR. So this is where that's done the management of all that stuff.

And here is where you'd go and add those responsible organizations we mentioned earlier, you can add or you can search, you can -- and this is where you can see the upload function here. This is where you can upload using those upload templates that I mentioned as well. And I think you can see that. Yeah.

And then here, this is your my profile. So this icon, this is your my profile. This is where you can go to manage your specific account or any subscriptions out of DRGR. And Chuck also mentioned earlier about logging out after a set time, because if you don't, the system will lock you out, so this is where you can go to log yourself out if you're not using the system; okay?

So just going back, you have your action plan. This is what it looks like. As he talked about earlier, this number is going to be your parents or your parents grant number; right? This is where your grant award is going to be -- where your grant award is going to be reported for both your fiscal 20 and fiscal 21 appropriations.

Your grantee name is going to be here. If you had any program income, this is where it's going to be. This action plan status will tell you what status your action plan is in. Once you guys have submitted your action plan status, and it's reviewed by HUD, this should reflect, reviewed, and approved. If you make any changes to your action plan after it's been reviewed and approved, it should be in modified status -- modified and ready to approve status; okay?

So within your action plan, this is where you're going to start putting your information in; right? The first half here is going to be your narratives. Down here is where are you going to enter your narratives. Obviously, this is not for the RHP grant specifically, but as Chuck said, your RHP grant will have narrative field boxes that are specific to the RHP grant. And this is where you'll go and you'll enter all those information.

And if you guys have already drafted your action plan, hopefully it should be a very quick copy and paste from your action plan, maybe some site edits and then pasting it to the fields here. Now, I just want to let you guys know there is a character limit. I'm not sure what the exact number is, but let's assume around, you can get around maybe 200 to 500 words in here? But there is a character limit so the system is not going to allow you to put a whole page or two of words in here. Maybe project to have something around this type of text, like two paragraphs of text for each of the categories or narratives that you need to enter in this section; okay?

This tab is for submitting any documentation. If we need to submit maybe the actual action plan document, you can put that in here and any other documentation that HUD may request that you submit to this tab. And here is where you start to report out on your financial information for both of your child grants. So as we discussed, here in the financials, you start to see the distinction between your parents and child relationship.

So let's say you're getting a million dollars across both your appropriations and let's see appropriation one is 500,000 and appropriation two is 500,000. You'll see that the parents will reflect a million dollars of your grant award and then your two child grants should reflect 500,000 each and there would be a specific number for your FY20 and for your FY21. And that's how that relationship is reflected in the financial section and your action plan; okay?

And here you'll have your project funding. Your project funding will tie to your projects right here. So here is where you would go and you'll start to create your projects. And as you can see, the projects are listed here; right? With your project budget, number of activities that are associated with those projects and so forth.

And I'm going to stop here and just show you that there are two ways to navigate, to create your projects. You can either go up here to the filler icon and you can go to your projects and you can add projects; right? Or you can just go here under your action plan, you can go here in the projects tab and had a project, same thing gets you to the same place; okay?

So before I move on, let's just do that. So when I click add project, this is what it's going to look like; right? So you're going to have your project number. Let's go and create a name. You can see because you need to prove your project title it's going to tell you to get that title in there. For me, I'm just going to use the same name. Going to put a description, just create something. Ignore -- you can ignore the project designation. You can ignore this. I mean, you're going to have your project status, it's going to be open.

Your effective date, you can put a date in there. Remember you put your project end date as well. And then here, let's assume that this is your available project budget. This is where you would go and enter how much of this project budget is for my child grant for my first one. And then how much is for my second one? And this is how you can actually go in and associate for your child grant. So this is the amount for your FY20 and this is the amount for your FY21 and those should total up to what you have for your project.

And then you go here and hit save, and that will actually create your project; right? If there's any errors, DRGR will flag it and it will highlight it in red like you saw earlier to let you know that, hey, you need to get this information and then before I can actually save this project; okay? And as you can see here, if you are using the data templates, you can come here and select upload project using the data templates, and you can actually upload the project through here as well. It should ask you to import the CSV file once you've inputted the information in that template.

Okay. So once you've created your projects, what we discussed the next step is to check to make sure you have your responsible organizations in the system; right? Before you move forward with your activities. So where you would go there is to go to the crown right up here. This is your administration; right? You're going to search for responsible organizations. So there's two methods you can either go to here and search and see what organizations you have already created in the system. Or you can run a report. I'm going to the data analytics and go to reports and run a report of all your responsible organizations in the system.

So either method works; right? So let's say we don't have the responsible organization in the system and we need to create it. You go to your crown, you go to add responsible organization, it'll take you to the screen; right? And here is where you're going to add your organization. You select your organization type. If you have your DUNS number, put your DUNS number in here and then put your address.

You can also put in a contact information, as well. It's not required, but you can do so. And then you can save it right there; okay? Or up here as well. So once you create your responsible organization, the next step is to add your activities. So instead of going all the way back to the management action plan, I'm just going to go straight here and go to add activity. And as you can see, I'm still technically in the responsible organization area, but now it just opens up a new window for me to add my activity.

So as we discuss before when you're adding your activity or creating activities, you need to first associate with the project. So if I've already created my project, all I can do is hit the dropdown and select my project; correct? And then under your activity type, as I said, you're going to have your specific RHP activity types. Obviously this is not an RHP grant specifically, but this is how you would select it.

One thing to be aware of is make sure that you have all your applicable RHP activity types here, which includes your -- everything from acquisition to all the other eligible activities to technical assistance and administration, if you're missing anything, be sure to contact your system administration, to make sure that they've given you access to all your activity types. If it's still not in there, just make sure to contact your HUD rep to ensure that you have all your applicable activity types in the system; okay?

And then here you can select your environmental assessments, maybe exempt, completed, or underway if you know that information, but it's not required. Your national objective is going to be LMC. So you should see an LMC national objective alone and then just select that. You can skip grantee program and then here, you're going to create your grantee activity number. So whatever that is, you can create that based on whatever nomenclature that you're using and then enter your activity description.

The activity status is going to be underway, if you're creating your activities or planned, if you had massive major action plan, you can also select this as planned. And then enter your project start dates as well. And then here is where you select your responsible organization as well. So if you have created your responsible organization, you're should be in the dropdown. You would just need to scroll. And as you can see, some grantees may have a lot, so you can just keep scrolling until you select your responsible organization.

And then here you'll enter your budgets as well. So once you've tied it to a specific project, just be aware that you need to align your activity amounts to that project, whether or not you have one or more activities within that project, just to make sure that everything reconciles in terms of your total dollar amount to that project; okay?

And then once you save, that should then save all your activities for the action plan for that specific project; okay? And then when you go to your management action plan, you can go to activities and down here, you'll see all the activities that you've created; right? You'll see your activity number, your title, your type, the responsible organization, the project title, your national objective, and your budget. Okay. So I'm going to stop sharing for now and see if anyone has any questions so far.

Carrie Kronberg: Onye, we do have some questions that have come in. I think the ones for you are largely about what to do in DRGR. So the first one, I think Chuck was getting at it. But it was when you are putting in the project title, is that a dropdown menu or is it something that the grantees will enter? And if they enter it, then what is the sort of structure of that entry? Is it state name and project or what?

Ndubuisi Ibeh: Yeah. So this is going to be up to the grantee to figure out what makes the most sense for them. Both project number and project title or not drop downs. This is something you need to create. This is similar to your grantee activity number and grantee activity title. So if you saw my earlier walkthrough, I just sort of created something off the cuff. So it can be -- depending on what type of nomenclature you want to use, it can be a combination of the grantee name, like you said. And this specific project type. And that can be simple enough to be your project title.

And again, these two things I have seen them, they can be the same thing, but it really just depends on whatever the grantee wants to use. And again, you want to make sure it's clear that it captures for you and for HUD, what exactly is this project; right? So I think it just, again, it just depends on what you want to use. It doesn't need to be lengthy. It can be very direct and straight to the point. But it's up to the grantee to figure out what the title is that they want to use.

Chuck Kreiman: Yeah. When you're in the system, it'll be pretty clear where you have a text field, or you have the option to craft project number one, project number two. Community recovery housing as a title and a description of that. And then the places where it's a dropdown, where you have to select from a dropdown includes project status, the date, and when you get to the activity level, you will have a drop down where you have to associate the activity with a project. So trying to reemphasize that, once the project is established, then you're able to establish activities under that. And your activity screen will ask you to select the project from which this activity is going to be related.

Carrie Kronberg: Okay. Great. And then a couple of questions about how to fix mistakes. So if you edit, can you edit the responsible organization if you place the wrong one?

Ndubuisi Ibeh: Yes, you can. So if you need to fix a mistake, sorry, maybe I misunderstood. There's the mistake that we're selecting the wrong responsible organization or if we --

Carrie Kronberg: Yes. Yes.

Ndubuisi Ibeh: Okay. So yeah, if you selected the wrong responsible organization, let me just give an example here. Here's an activity, there's an option here to edit the activity. It looks like a pencil. You can select that, it will pop up the screen, and hit edit. So this is where you can edit the activity. And then if you made a mistake by selecting the wrong responsible organization, you can just change it to something else, whatever the correct one is; right?

Chuck Kreiman: And then save it before you leave.

Ndubuisi Ibeh: Exactly. I obviously don't want to say it right now because this is someone else's thing, but yeah, I just wanted to walk through how I got there. If someone missed it, what's your action plan? So you can go to action plan activities, search for your activities, or you can go down the list here. Hit the pencil, hit edit again on the top right. This is going to open up the window for you. And this is how you can edit existing activities if you need to edit them. And then yes, like Chuck said, you can hit save. Not going to do that, but that's where you would save your corrections.

Carrie Kronberg: Great. And then similarly, if you make a voucher error, can the voucher be reversed or revised? How do you do that? I don't know if we've --

Ndubuisi Ibeh: Yeah. So let me table that question.

Carrie Kronberg: Yeah. So we'll cover that when we get there. And then another question was, because you'd mentioned section three reporting. And does the system recognize or trigger, I guess, identify that section three is triggered by a particular activity or is that something grantees need to be aware of?

Ndubuisi Ibeh: So the system is not going to tell you that, the grantee would need to be aware. Again, if you have specific activities under programs where you know you're hiring and you're trying to adhere to the requirements of section three, you're -- the grantee is going to need to know that that's what they're doing. And track all eligible employees that have been hired under section three and then report that out under those specific activities in DRGR. The system is not going to automatically know, oh, this activity will trigger section three. Also for grantees, they should be aware of the activity type that they're selecting for their activities. And I believe the activity type should then provide the right performance measures under that activity type, such that the grantees can then report out appropriately for those activities. Does that make sense?

Carrie Kronberg: Yeah. That makes sense.

Ndubuisi Ibeh: Let me share my desktop again. So if you go under management action plan, you're going to see all the different performance measures under this tab, and you can see it as a wide variety of different types of measures. And again, this is going to be dependent on the type of activities you have and the activity type, but within your activities, depending on the type of activity that you select. It's going to hopefully have number of section three labor hours, total labor hours, and that stuff.

DRGR isn't going to tell you, hey, please put a number in here, but based on the activity type that you select, this should provide you the option to put the number in there, but the grantee needs to know, okay, we're tracking this information. Where in DRGR can I put that information into, and that's going to be here; okay? Within your manager activity, go to measures and it should be here; okay?

Carrie Kronberg: Great. And then I think the last question for now is, for HUD, if Corey [ph] or Erin, is willing to take it. So do you have to have your action plan approved in DRGR before you start having real recovery projects?

Corey: You don't have to -- this is Corey. You do not have to have your action plan clearly in DRGR before creating new activities. You can -- some grantees may have specific activities that they intend to carry out finalized before submitting their action plan. In which case, they can submit that as part of their action plan for review by the field office. If grantees don't provide activities that are reviewed by the field office, as part of the action plan submission, they will have to provide those activities to create those activities before they can draw down to the funds, which will require a field office review. So it kind of just depends on where grantees are in their program development, by the time they submit their action plan.

Carrie Kronberg: Okay. And is when they have those activities, if they submit them initially, is that considered an amendment that requires field office review?

Corey: It wouldn't be considered as substantial amendment, so long as those activities are consistent with what the grant has in their action plan submission.

Carrie Kronberg: Okay. I think that's it for now. I'll turn it back over to you.

Ndubuisi Ibeh: Thank you, Carrie. Thank you, HUD. So that was a DRGR walkthrough, we'll jump back into DRGR when we get to the voucher creation section. So once you've entered your action plan, narratives, your projects and your activities, you should have enough -- oh, and your performance measures, you should have enough to be able to submit to HUD for their review and approval. But just bench -- jumping off of what HUD just mentioned, I think as per the notice, I think the minimum that you need to get into the system in order to get the review and approval are just your projects.

If that's all you know at this point in time, but then subsequently you would have to do an amendment in your DRGR action plan to make sure that you have your activities and your performance measures and your budgets appropriately allocated and filled in order to get locks approval or authorization to actually spend funds and go forward. So as per the notice, in addition to submitting your DRGR action plan, you also want to be aware that you need to submit the RHP action plan certifications and your -- and the two SF-424 forms. There's SF-424 and the SF-424D.

All this stuff needs to be compiled. What's your action plan, and I believe is to submit it to your HUD office or mailed -- signed, and mailed to your HUD field office as well. So just be aware of that as well. Once you've submitted your DRGR action plan in the system.

Chuck Kreiman: Yeah, I was wondering, could you clarify whether these documents can be upload -- used under the upload function or they action plan if you create them and then are able to upload them or to the hard copy have to go in?

Corey: Hard copies.

Chuck Kreiman: Hard copies. Okay.

Ndubuisi Ibeh: Thank you. All right. So now we're going to move on to the next section, which is going to cover the manage my financials modules that we went over a little bit earlier. We're going to talk about creating your vouchers and approving those vouchers as well. Okay. So just to start off, what are DRGR vouchers? Basically, they reflect what I would call like a request for payment by the grantee to HUD. Basically, these are kind of like the financial transactions that HUD can see. And for your specific grant, these are going to be the way that HUD measures your progress on spending your funds timely.

One thing you want to be aware of is that as you guys are managing your grants and your financials, you want to make sure that you have segregation of duties, such that you have at least two people that are involved in the voucher creation and approval process. One person is going to be the person creating your vouchers and the other person's going to be actually approving those vouchers. You should not have it be that you have the same person creating and approving vouchers, simultaneously. That would definitely be an audit risk. So your vouchers are going to contain a multitude of things. It can be either your invoices, expenditures, or just even a summary of how you were charging costs to your activities.

And even after your vouchers have been created, there is the option that you're draw requester who created the voucher can then still go back and revise those vouchers if they need to be revised to make corrections because of something that was drawn incorrectly and so forth. So yeah, your DRGR vouchers are just a reflection of what are the payments that we're requesting for HUD for costs that we've incurred; right? Another aspect of this is that before you can actually draw funds, you need to actually obligate the funding once HUD has authorized your ability to spend down funding.

So you're going to create your projects. We talked about creating your activities and basically as you're creating your projects and your activities, you're creating your budgets to those structures; right? Within your activity structure, you actually need to obligate funding and you also need to obligate funding at the project level. Your obligation is basically saying of this amount, this is how much I'm committing. And once you've made that commitment, then you have the ability to actually create your vouchers against those commitments.

So this is just a quick math to show you what that looks like. Once you have your obligated amount, your obligate amount is going to be a combination of approved vouchers and pending vouchers that you have, and that's going to equal the amount of program funds that are within that activity that have been obligated; okay? And one thing you always want to make sure is that you have enough obligation amounts that is sufficient to cover the amounts that the voucher is for. So we can walk into that in greater detail soon.

So basically, the steps for creating and approving a voucher is going to be that you're going to go to the voucher creation screen under manage my financials. The user who's responsible for creating the voucher is going to basically select which activities tie to the child grants are applicable for the specific voucher. Once they select them, they're going to make sure that the obligation is appropriate for that activity. They're going to confirm that the math is correct; right? And then once they've done that, they're going to enter in the amount that they actually drawing down for. And then they're going to submit that voucher.

Once the voucher has been submitted, the voucher approver, who's just going to be a different user, is going to go into DRGR, select the line items within those vouchers and approve for each of those selected vouchers in the system. One thing to know or be aware of is that typically when you guys are submitting your vouchers, there is going to be a threshold that is within the system that basically alerts HUD, that you guys have drawn above a certain amount. And within -- above those amounts, HUD will request that you upload voucher documentation. So it can be invoices or any backup or support for those costs such that they would need to review in order for the voucher to be finally approved.

So for vouchers over a certain threshold amount, it will require that HUD approves those vouchers. What that amount is currently, I think HUD is working on that. So just be aware of that. And I'll also show you how to navigate the screen so you can see what that threshold amount is. And you can check that anytime you need to check that. And then once you have submitted the voucher and it has been approved by HUD or by the system, payment generally occurs within three days from the treasury, and will be deposited in the grantee's accounts within those three days.

All right. So now I'm just going to go back into DRGR and show you guys what that looks like. Okay. So here we are back into DRGR. Before we go into this, I just want to cover the certifications and FS-424 forms that I had mentioned earlier. If you go to grants.gov, you can see a copy of those forms right here. This is the SF-424 and SF-424D. So you can actually run a PDF of the templates if you need it. And on the slides, there's also a link to where the RHP certification forms are as well. So you can see the RHP certification. It's a three page document, grantee needs to sign and date it.

And as HUD Feds, just send us a hard copy with the submission of the action plan and DRGR. Okay. So you've covered that. So now you set up the action plan, you want to start reimbursing for costs that you guys have incurred. Where are you going to go to first is you'll go to the dollar sign here, which is management financials. First things first, you want to check your obligations so you can go to search and edit obligations right here.

So just to be aware, this is going to be grant specific. So if we remember what we mentioned earlier, these options here with the global sign are areas where you can search for things across the entire system; right? But this does not have that. So this means that you're going to be doing searches within the specific grant number. So just be cognizant if you're not in the right grant, let's say you're managing multiple grants. You want to be aware that you're selecting the right grant here. Once you've done that, then you're going to select and search for the activity numbers within that specific grant number; right?

And once you found the activity that you're trying to draw down against, you can go to view under action and you can check to make sure that you have the right obligations that's needed to drawdown the funds; okay? I hope that makes sense. And I'm not sure why it's not here, but typically there should be an edit function here, which should allow you to edit specifically your obligation amounts as well; okay? So you want to make sure that you check your obligations and make sure that you have enough to actually drive down your funding.

So let's assume you do, you have enough, you can go back to your dollar sign. You go under drawdowns and you select create a voucher. So once you create a voucher, you should see a screen like this; right? And you to basically select add more activities. Here's where are you going to select what grant you're looking at specifically. If you don't know, you can leave it blank. And then officially you're going to search -- the system is going to take some time. And then it's going to produce a listing of activities that are in the system based on your search criteria; right?

And there's going to be two options. You can either select program funds or receive funds. We're not dealing with any program income or revolving loan fund, so you can ignore this. And really, you should be just focusing on program funds for the most part. And here is where you'll select your program funds; right? Then you'll scroll down and select add activities. And once you add the activities, you'll see them show up here under your voucher items; right? You'll see the fund type is program fund, which means that you're drawing down from your main grants and not from program income.

You'll also see an option to select remove. So let's say you add the wrong activity, you can select this and then say, remove voucher line item, if you need to. If you need to add more activities, you can still do so; okay? And then once you do that, you hit continue. It's just taking a little bit time to load.
Let's -- okay. Oh, no. It must've crashed. Okay. So typically, once you create the voucher and you select your voucher line items, it should give you the option to -- let me try that again. It should give you the option to select how much you're drawing down for a specific activity. Here we go. Okay. This is working.

So as you can see, this is the activity that I selected. You want to double check to make sure that you're selecting the right activity from the right grant. A good thing here too, is to be cognizant of the field called available amounts. This is going to be feeding from the obligation. So this is basically telling you, this is how much I have available to drawdown. So let's say, I want to drawdown a dollar. You can put that in there. And then what you can do is click this number here, which says update available amount. So once you select that, it updates this, so you can see that based on whatever I'm trying to drawdown I still have enough to draw down funding; okay?

And then once you verify that you have enough, you can click submit voucher. Now it's going to create this table that says, okay, this is what you're trying to submit. It's going to give you a voucher number, a date, who created it. You can -- if this is a voucher that is above the amount of the threshold that we talked about earlier, this is where you can submit attachments or documentation. You can even put in comments to explain what this voucher is for if needed. And then you hit confirm. And once you confirm it goes straight to a system, if it's a number, if it's an amount that's below the threshold, it should be automatically approved. But if the voucher amount is above that threshold, then, like I said earlier, it's going to require HUD to review and approve it and it will be locked in HUD pending approval status; okay?

And that's it. That's the steps for creating a voucher. Now, if you want to approve the voucher, again, this is going to be delineated to specific roles. So you'd have to log -- so someone else would have to log back in under their approval role. And what they'll do is they'll go under the dollar sign; right? And instead of create a voucher, they should see an option to search an approved vouchers. And essentially what that would look like is they'll go to the search, they'll search for vouchers that are under either -- if they know the number they can search for the voucher number, they can search by the grant. They can then search by pending if it's pending them to approve; right? And then those search, find the voucher if there's any vouchers they'll find those vouchers, select them, and then they'll approve.

And then once it's approved by the voucher approver, It should go straight to HUD or to the system to process the payment. Okay. I'm gonna stop there because I might've went too quickly. So does anyone have questions on that on the steps for creating a voucher or approving a voucher?

Carrie Kronberg: We haven't had any questions come in on that. So we'll maybe give people a minute to think about it. You can go on and then we can come back to it, I guess, if there are questions.

Ndubuisi Ibeh: Great.

Chuck Kreiman: Onye, did you clarify how funds get obligated in order to have funds available to create a voucher? So what step is actually completed to go from an activity budget to funds obligated for that activity?

Ndubuisi Ibeh: So once you've set up your activity with the budgets, you go to a dollar sign; right? You go to search edit obligation under your management financials, and then you're going to search for your activities here under your specific grants; right? Again, you want to be cognizant of which grant you're under, because this is not a global search. There's going to be very specific to your grant number, as you can see, it's grayed out. So just make sure you're under the right grant number. If you know your activity number, you can put it here. If you know your responsible organization, you can put it here. And then you search.

And then once you search, it should be a listing of all your activities. And then here, there should be two options to view and edit. If you click the edit option, it should take you to the screen, which then should allow you to edit your obligation.

Chuck Kreiman: So there's an edit option that we didn't see.

Ndubuisi Ibeh: Yeah. Let me --

Chuck Kreiman: I think because we're in a training area.

Ndubuisi Ibeh: Exactly. But let me see if I can -- let me see if I can find one. Bear with me. Okay. Here we go. So this, you can see under this grant is a variety of activities and here you see the option to maintain. So if I hit maintained, here we go. And as you can see under the specific grant, you have the activity; right? You have your total budget, your obligated amounts for this grantee. They obligated everything, which can be helpful because then you don't have to do this every single time, because you know that you've committed all your funding. And then you have your draws.

So basically if I can -- if I go through this activity right under my create voucher, you should see that you have a balance of the obligation minus your drawdown. You can tweak this number any time. So if I want to lower the obligation, you can do so, and save it. I'm not going to do that, but you can save it and then we'll change this amount here as well.

Chuck Kreiman: So typically when a grantee signs an agreement with the responsible organization, there's a contract to undertake the activity. That's when the amount will be obligated.

Ndubuisi Ibeh: Yes. Yes. Does that make sense? I hope it does. All right.

Carrie Kronberg: We have that question that we wanted to revisit about if you make a mistake on the voucher, how to fix that?

Ndubuisi Ibeh: So I guess I need to understand the type of mistake we're talking about. So there's two ways to fix different types of mistakes. So let's say I've gone in, I've created a voucher, and I've already submitted it; right? The person who's going to log in and approve their voucher can review the voucher; correct? And we can review the activities. Let me -- let me do an example. They can -- they can search for the voucher. Let's see. Let's see. No. Okay.

It's not coming up right now, but so whoever's approving the voucher, they can search for the voucher; right? And go into the voucher. They're going to review the voucher to make sure that it has the right activities, that the amounts being drawn are correct. And if something is wrong, what they can do is they can actually reject the voucher; right? So that's one way -- once the voucher is rejected, the person who created the voucher can actually go back and revise the voucher for the correct amounts before it ever gets approved in the system; okay?

So similarly, if the voucher makes its wait back to HUD, if it's a voucher that's above the threshold, HUD can also reject it. And that can also give the grantee the opportunity to revise the voucher to make sure that the voucher accurately reflects the right activities and the amounts that should be drawn under the -- under those activities. Now, let's say the voucher has already been approved, but later on, maybe the supporting documentation within that voucher has changed or maybe the amount -- the amount for specific activities needs to be adjusted.

The grantee can actually go back into the voucher, and revise the allocation of costs if need be within that voucher. And basically what we call that is a voucher revision, once you revise the voucher, and again, the user who created -- who has the ability to create vouchers is the ones that's going to revise the voucher, not the approver. So once the voucher creator revisers the voucher, then the voucher approver needs to approve that voucher again; okay? And then that revised voucher will be logged in the system. So yes, there are ways to revise the voucher if corrections need to be made. Does that make sense? I would like to show you, but it's not allowing me to find any vouchers. So can't really show you that.

Carrie Kronberg: Oh, the asker provided a little more detail. If the voucher is associated with the wrong grant, does HUD have to reject it? I'm not sure at what point in the internal approval process it is, but I guess, well, I could also say that if folks get to that point, there is the DRGR AAQ desk that you can -- that we can plug. Like if you are having a specific issue, you can -- that's available to you, but go ahead, Onye.

Ndubuisi Ibeh: Yeah. That might get a little tricky. And it really just depends, working with HUD and how they may want you to address that if you happen to draw from the wrong grants. And it has already gone through the full approval process, then that's more of a conversation about how to -- because you've already logged the payments under a different grant, so you'd have to correct it by logging the payment correctly under this grant.

And then under that grant, if you can, seeing if you have any costs and basically re-correcting that payment to reflect the new costs that should be eligible for that grant, but that's something that you may want to work with your HUD rep to make sure you have like a policy and procedure on how to make those corrections. Go ahead.

Chuck Kreiman: Yes, Onye, is there a process for repaying incorrectly drawn funds? I thought I saw something -- it came up.

Ndubuisi Ibeh: Yes. So HUD does have a process for that. I may not walk through that, but there is a process where I think -- go ahead.

Chuck Kreiman: I think for the error -- maybe the error that the participant is speaking about is where you actually go back and repay the incorrectly drawn funds to the grant from which it was incorrectly drawn, and then start a new voucher for the correct grant.

Ndubuisi Ibeh: Yes. Yes. Yes. So that's -- that is an option as well. You can repay HUD those funds and then correct it appropriately. So sorry, now that this has popped up, I just want to show you how to revise the voucher. You can search for the voucher and then what you can do is go to maintain and within the voucher you can see, this is how you do it before; right? And then obviously it should be an option to, ah, there we go. So if you need to revise this voucher, you go here and you can revise this voucher and make corrections based on what was drawn before.

So that's how you can edit vouchers that haven't been approved previously. You search for it, and then you can revise it and then once you revise it, the voucher approver needs to log back in and approve the voucher; okay? Any other questions on that? Okay.

Carrie Kronberg: Sorry, I'm looking for my mute button just a thank you.

Ndubuisi Ibeh: Okay. No problem. All right, so I'll stop sharing for now. So that covers it for the live demonstration for creating and approving vouchers. Now we're going to talk about performance reports. So as part of the specific grants and in the notice, you guys are required to report annually, and basically what you're going to be reporting on -- you're going to be putting through DRGR where essentially you're going to report out on your obligations and expenditures to date and any other financial information that's pertinent for the RHP funds.

This report is going to be something that HUD is going to look for as due 30 days after the end of each fiscal year, which I believe -- which I believe will be October 30th; right? For this -- for this grant. So around this timeline, you want to make sure that you had your annual report ready to go. And again, this will be through DRGR functionality that you should be able to do this. A lot of what's going to be happening in the report, again, is going to be reporting on your financials and your accomplishments as per each of your activities.

So if you remember, we had talked about your performance measures. In your action plan you're going to be putting in your proposed accomplishments. It's going to be in your annual reports where you're going to be saying, okay. If I propose that by the end of the year, I serve 30 people. Maybe my actual is 35. So you want to be able to report out that against your proposal. You've actually served 35 and all this information is stuff that you're going to want to capture in your annual report. If you guys are used to working with the typical comp plan, I think it should be kind of similar to that as well. So it shouldn't be all too different.

To aid you and being able to report out in your annual reports and just in general for tracking your progress on your grants, just want to highlight again, there is that report module in DRGR, which takes you to the reporting function called micro strategy. And within that, you do have access to a variety of reports that allow you to take a sneak peek into what's happening with your grant. So one thing is specifically for the RHP grant, you guys do have timeliness requirements to spend 30 percent of your grants within the first year, and then 100 percent by September 1st, 2027.

There are so many reports in there that allow you to see your progress for how many voucher payments you guys have logged to date, so you can keep track of where you guys are. In terms of your timeliness of expenditures, you can see other reports for how you're doing on your accomplishments and so forth. So just wanted to make you guys aware of all those different types of reports. They are in a system, and it's good to make the best use of them.

And that wraps it up for our presentation. So I think we have about 30 -- 13 minutes left, so I'll open it up for additional questions and answers if you guys have any. I know we went through a lot. So if there's anything that was confusing, just you can feel free to ask now.

Carrie Kronberg: We don't have anything new related to the information you just presented. So we'll give folks a minute to type thing in. And then, we did have a question that I wanted to send to HUD about going back to section three, is that something that grantees should be reporting in DRGR or spheres [ph].

Corey: Within DRGR, so there'll be no reporting for section three in spheres as of July 1st. So grantees will be reporting that for RHP in DRGR. We will have more guidance on reporting on section three activities as well as general compliance with section three in the relatively near future. But yes, it will be reporting in the DRGR. And also, as we maybe wait for a couple more questions, I just want to correct something I --or distinguish something I said in response to Chuck's question about whether the certification and the 424 will have to be sent to the field office.

So there -- they don't have to be sent to the field office, but they -- there are hard copies of those documents. So grantees will print out physical documents and sign them and upload them into DRGR as part of their action plan submission and maintain those hard copies. So it's not the certification of 424, they're not integrated into DRGR, but you can still upload them -- upload the signed, scanned copies into DRGR.

Ndubuisi Ibeh: Just to add to that, so just for everyone on the call, once they fill out their action plan, they can submit the scanned copies of the SF-424s, the RHP certification, the actual -- if they have -- if they have it, the actual digital version of your action plan that they submitted for public comments and select the submit button. And HUD will review it within the system. Is that what we're saying?

Corey: Yeah.

Ndubuisi Ibeh: Got you. Okay. Thank you.

Carrie Kronberg: Okay. And then another -- section three is a hot topic. Will that -- so RHP reporting is annual. Will the section three reporting also be annual for these programs for this program or quarterly, like on other like NFP and CDBGDR or DRGR reports?

Corey: So before I say something incorrect, I would just say, wait for the guidance only because our notice that covers CDBG and CDBG related programs stuff in RHB hasn't been finalized yet.

So we'll just wait -- you'll have to wait for the notice in terms of they -- how often those [inaudible].

Carrie Kronberg: Okay. Well, I don't see any other questions --

Ndubuisi Ibeh: Hey, Carrie.

Carrie Kronberg: Oh, go ahead.

Ndubuisi Ibeh: I do have a question. So I think we only had maybe one or two grantees on the line who said they actually went to DRGR. I'm not sure if they tried to create projects and activities yet, but I think HUD, you guys are working on still getting the consolidated action plan structure set up? So I'm not sure if grantees on the line will be able to see the three different child grants just yet. Is there an update on that? And if they don't see it, do they just enter the allocation for the first appropriation in the meantime?

Corey: So I'm not sure if it's in there yet, and if it's not in there yet, it will be in there very shortly. So I would advise just in a manner of a week or two, it will be in there shortly that the dual multiple will have grants for those -- those [inaudible] that have allocations.

Ndubuisi Ibeh: Got it. And if grantees are, let's say, missing eligible activity types or not seeing them, do they just work with the HUD rep to get those in there?

Corey: Yeah. Please send them to your HUD and then they can notify us and we can make the change.

Ndubuisi Ibeh: Thank you. That's it for me.

Chuck Kreiman: Yeah. I would just reiterate folks to use the online resources. There's an AAQ for DRGR, there's a plethora of resources in the HUD exchange DRGR section, and your HUD field office. You need to get administrator re-certified or have questions about any other procedural kinds of things that you have to go through. If nothing else, if you can get in the system and you know that your entity is going to be involved with undertaking your RHP activity is not currently involved with HUD programs previously, they take -- jump the gun and get them entered in the responsible organization part so that as you -- when you're ready to go through and do all your entries, they're right there and they'll pop up when you're entering that activity. That'll be one of the options you'll have in the system.

I guess the only other question I have for the participants, or is maybe somebody has a target date for getting their action plan submitted into HUD for review and approval, I'd be curious to see how close some of our participants are.

Carrie Kronberg: Okay. Great. I wanted to see if Erin had anything to add on DRGR and if you want, there's also a question about -- might we be increasing the file size because the three MBs is very limiting.

Erin: So I think you guys covered everything. The only other thing that I wanted to add was that the DRGR action plans have to be in HUD approved status before grantees can submit their annual performance report. So it's just kind of just a planning note. You know, you want to make sure if your action plan is being modified or something around that October month, then you guys just want to make sure that you go ahead and get it submitted so that HUD has a chance to approve it so that you can submit your performance report on time. So that was just a note and then I'm looking for other questions? Could you repeat the other question?

Carrie Kronberg: Sure. It's will HUD be increasing the file size for uploads? Because the existing size is limiting.

Erin: So I -- I think we'll need to follow up with you all on that because I'm -- I'm not aware of there being a file limit that would get any of the grantees stuck and unable to upload. So we can get back to you guys on that one.

Carrie Kronberg: Okay. Great. I don't think there are any other questions. I don't know if HUD has any final thoughts otherwise think we can end and give folks four minutes.

Corey: Just as a thank you to ICF and Chuck and Onye for walking through this. I know DRGR is a -- it's a new for many grandkids and a lot of grantees are concerned with understanding it and making sure that they're inputting information correctly and using it correctly. So thank you very much for walking through this. And of course, if you have further questions, you can submit the questions to your rep or to your AAQ for further help.

Carrie Kronberg: Great. Thanks, everyone.

(END)