Steven Edwards:	Welcome and thank you for joining DRGR Public Action Plan training for grantees. Before we begin, please ensure you have opened the Webex chat panel by using the associated icon located on the bottom right corner of your Webex screen. Please note that all our connections are muted at this time. You may submit written questions throughout the presentation, and these will be addressed throughout the presentation. To submit a written question, select the Q and A icon located on the bottom right corner of your Webex screen. Enter your question in the message box provided and send. If you require technical assistance do send a chat to the event producer. With that, I will return the conference over to Rosie Beaman. Rosie, please go ahead.
Rosie Beaman:	Good afternoon. Thank you so much. Welcome everybody. Thank you all for joining us this afternoon for the DRGR Public Action Plan training. My name is Rosie Beaman and I am the assistant director for operations, the Disaster Recovery and Special Issues Division here at HUD. Today, we have two presenters. Hana Nelson is a DRGR specialist in the DR side division. And Jennifer Alpha is a senior consultant at TDA, which is one of the HUD TA providers.

We also have Steven Edwards, who is another DRGR specialist in our division who will be managing the chat today. So if you have any questions, while we go through the presentation, please use the chat feature and he will respond to your questions there. Thank you all for joining us today. We hope that this will be a useful session, especially for those of you who are working for one of our newer grantees. And with that, I will hand it over to Hana Nelson. Thank you. |
| Hana Nelson: | Thank you so much, Rosie for the welcome and good afternoon, everyone. My name is Hana Nelson, and as Rosie mentioned, I'll be one of the trainers today for this Public Action Plan training. I am also a member of the DRSI DRGR team and I am based out of Houston, Texas. I am very happy to have Steven Edwards with us. Who's our lead, DRGR staff person within DRSI. And we also have Jennifer Alpha who's helping me present. So I'm really hoping this is a really beneficial training and also a refresher for our FY20 funds. And then also for our new grantees who received FY21 funds. So as far as the format for the presentation today, we're using slides and there will not be a live demonstration. The training objectives listed here were provided in the Lister. So I'm not going to read those out loud, but I do just want to reiterate that this training will focus on the new public action plan module NDRUR, which is currently only applicable to our FY20 and 2021 CDBGDR grantees.

And so before we get started, I want to mention that this training may be a refresher for our grantees who received those FY20 CBGDR funds. Because I know many of those grantees are in the process of already developing and submitting their public action plans in DRGR, which is exciting, but has been a lot of hard work up until this point. So there may be things that you've been pretty familiar with, because you've already been in the system. |

However, I will ask you to bear with us because we have several new grantees included in our 2021 CBGDR appropriation class. And so I want to make sure they also have the same opportunity as far as training and getting all the information that is out there on the public action plan. So like I mentioned, we have Steven on the line who will be answering questions via the Q and A option that's here within Webex. And if for some reason we're unable to answer any questions today, we will follow up after this training ends and get you all answered to those questions. And so no worries, we'll follow up as soon as possible, we will be getting a copy of the Q and A check almost immediately after following this training. And so we'll answer as quickly as possible. Alrighty. So let's go ahead and get started here. So first we're going to start with a public action plan overview.

All right. So the public action plan module requirement in DRGR came into play with our FY20 and FY21 CBGDR allocations. So you'll hear me mention the FY20 and 21 class of DR grantees several times throughout this presentation. So public law, 117-3 now requires grantees allocated funds, undergoes applicable notices to submit their public action plan via DRGR. And it can no longer be submitted via email as previously done for our grantees who've received older CBGDR appropriations. So this new public action plan component in DRGR is a requirement for our FY20 grantees and our FY21 grantees. And you'll hear me repeat that several times throughout this training, just because we've received lots of questions. We have older grantees who have asked, so I just want to make sure it's very clear that this new feature is only applicable to our FY20 and 21 grantees.

So like I said, it doesn't affect any grantees who've received older CBGDR appropriations, who've submitted those paper or published or hard copy action plans to HUD. So those grantees will continue to submit amendments outside of DRGR. And again, it has no effect on those older CBGDR grants. So for FY20 and FY21 grantees, they will develop and submit their public action plans via DRGR for HUD review and approval. So the entire process is completed in DRGR. The public action plan in DRGR will then serve as an umbrella for the DRGR action plan.

And so the DRGR action plan is a description of the grantees projects and activities. So we're basically calling this a single action plan in DRGR that includes the grantee first submitting its public action plan via DRGR and then as grantees have done it previously, they'll develop their DRGR action plan, including those projects and activities in DRGR as well to start expending funds. So in summary, there's no change for older grantees with processing paper or published action plans. Our new FY20 and FY21 grantees will submit the public action plan. And DRGR action plan in NDRDR using the manage action plan screen, which I will show you guys throughout the presentation, but that's the important key. It's all done in DRGR now.

So here is language I pulled out of the notice where it states that the public action plan must be developed and submitted in DRGR or applicable grantees,

including all action plan amendments. And so this section also notes how the public action plan is different from the DRGR action plan. It states that the DRGR action plan is a comprehensive description of privates and activities in DRGR the same as how current grantees from older appropriations who are not using the public action plan use DRGR to set up and draw against their activities. I did also bold language here stating that grantees should develop and submit their public action plan in DRGR. Like I've mentioned, we've had a few grantees already complete and even submit their public action plan in DRGR. We have some lessons learned that I will discuss during this training.

And I have included some frequently asked questions that you'll see throughout the training as well, that will help discuss those lessons learned. So you'll hear us stress the importance of developing the public action plan in DRGR because it is important for the grantee to review their applicable public action plan template, to ensure they know all of the information required to be submitted with their public action plan. And also trying to copy and paste the entire public action plan from a word document may add additional formatting burdens and frustrations. If Green Key is attempting to enter their entire action plan into DRGR, let's say for example, today they want to post their public action for action plan for a public comment. So it's just good to make sure you're using the system for its purpose, and you're actually going in and reviewing the public action plan module and working in tandem to develop and draft your public action plan.

Like I mentioned, we currently had our class of FY20 grantees, and then recently in May, we had a federal registered notice that came out that appropriated funds for our FY21 CBGDR grantees. So the FY21 class introduced both new state and local governments, which required us HUD, the DRGR team to make some changes to the public action plan template and tables. We have a few FY20 grantees who received FY21 money as well, who are now considered consolidated grantees within the system. And those grantees are aware. So basically they have two different funding sources for FY20 and then for FY21. And so those grantees who are now considered consolidated grantees with this new FY20 and 21 money, those grantees per the federal register notice have the option to either amend their initial public action plan submission via DRGR or hold off on submitting until they have completed developing their public action plan for both FY20 and FY21 funds.

And that's detailed in the federal register notice. I just wanted to bring it up. Those grantees who received money under both appropriations they're aware, but I just wanted to bring that up here. And so another change with the introduction of the FY21 notice and funds is that the DRGR team, we went in and edited and removed a few tables that were previously required in the public action plan template. And this is another reason why, cause I know sometimes there are grantees who collaborate and discuss things before the notice is released. And so I just want to make sure that each grantee understands that they should go in and make sure that they're reviewing their applicable public

action plan template. So they understand and know exactly what information they're required to enter, because it may vary grantee to grantee.

All right. I'm going to continue the overview and this is more general. A lot of it so far has been specific to FY20 grantees and then FY21. So now we're going to get into more of the general overview and of the public action plan for you guys to get a better understanding of this new module in the DRGR.

I want to ensure that everyone kind of understands the new public action plan feature in DRGR. Most grantees have previously produced these large word documents with text tables, maps, and images, which was ultimately turned into a PDF for public comment and then posted to their, DRGR website, their DR website. This new public action plan module in DRGR will give grantees the same opportunity to develop their public action plan, but it will now be hosted in the DRGR system. But once it's created in DRGR grantees will have the opportunity to download a copy to make available on their CBGDR website. So there won't be a lost in transparency to the public and how grantees are planning to spend their money. It's just more so now it's now done in the DRGR system.

So we will keep going. So now we're going to talk about the Public Action Plan versus the DRGR action plan. And so the DRGR action plan for our older grantees, you're familiar with what we're calling the DRGR action plan. The DRGR action plan is now housing, your projects and activity details, which grantees who've received older appropriations have been completing in the system to date.

For grantees developing a public action plan and then submitting their DRGR action plan, this will be considered a single action plan with the public action plan serving as an umbrella but there are still two different review statuses in DRGR. So HUD grant managers will have to review and approve the public action plan in DRGR and then review and approve the DRGR action plan, including those project and activity details. This is important to note here, and we'll note it several times throughout the presentation as we're reviewing screens, because again, how the system works now, in order for grantees to submit their QPRs, which are considered, which are performance reports and quarterly performance reports for our newer grantees. Timely their DRGR action plans must be in reviewed and approved status.

However, it's important that you guys understand those two different statuses because while a grantee may be making changes to their public action plan, it is their DRGR action plan, their privates and activities plan is in reviewed and approved status that won't hold up the grantee submitting their QPRs time room. So that was my point there.

Next I'm going to talk about the relationship between the public action plan and the DRGR action plan to do a little deeper dive. So the public action plan has a direct relationship with the DRGR action plan. So remember like I've been saying

the public action plan serves as an umbrella for the DRGR action plan. So a grantee must set up all of their grantees programs, which we will discuss grantee programs in detail later in the presentation, because I know the programs are new to most of our grantees. So they'll set up the grantee programs and the public action plan in order for the grantee to then associate those activities created in their DRGR action plan to those programs.

The public action plan develops in DRGR can be downloaded. Like I mentioned earlier to allow grantees to complete translation requirements. To allow the grantee to post their public action plan for public comment. And so it's similar to how grantees were posting their action plans, their paper or hearts at the action plans outside of DRGR. The grantees will still have the same opportunity to produce that public action plan and complete the translation services, the public comment requirements, all of those things required within your federal registered notice. And then, like I mentioned, previously, once the public action plan is approved, then the DRGR action plan will be submitted and that will be reviewed and approved. And so submittal and approval of the DRGR action plan is an important step as well, because that is the DRGR action plan is how grantees will then continue on with submitting their QPRs. So one step DRGR action plan is submitted, reviewed, and approved grantees. Then start drawing funds against those activities and then reporting their performance quarterly.

So here is a graphic for our visual learners. I've had a lot of words on these slides. And so I added two slides here that I think may help describe the relationship between the public action plan and the DRGR action plan. So the grantee like we've been talking about first develops their public action plan in DRGR, using the assigned template to include all of their narratives, maps, data tables, et cetera. And it gives them the opportunity to create the entire document in the system. And then they can submit for HUD review and approval. Then once the public action plan is submitted, the grantees can then develop its DRGR action plan, which details the products and activities. So you see here for our grantees who are familiar with DRGR you see the DRGR action plan remains the same as far as grantees first, creating their projects, and then they associate and create activities to those projects.

So yes the activities will be housed at the project level. So for any grantees who are completely new to DRGR, some of this may be a little foreign and we're doing a deeper dive, but we have several helpful recorded trainings on the head exchange, which may help answer some questions or further clarify some of this information that we're talking about. You can also submit, ask the questions A and Q via the HUD exchange, or you can ask your HUD rep or grant manager if you need DRGR technical assistance. So I just wanted to point that out because I know some of this may be new to some of our newer grantees. So here is another kind of visual, and this is just focus on the DRGR action plan. And I keep stressing the difference between the two, because it's been confusing. It was very confusing in the beginning for some of our grantees.

So we have the public action plan, and then we have the DRGR action plan, which houses the activities and projects. So I just wanted to make sure that's clear, you guys will get a copy of these slides. They'll be available on the HUD exchange. So you can also use this as a reference moving forward. I just want to make sure that's very clear. And so also for our newer grantees once you create the activities, that's where you're going to draw your funds against the activities and report your actual accomplishments. Once you get to that point. So setting up your public action plan and also setting up your DRGR action plan correctly in the beginning is very important.

So now I'm going to talk about all of the modules within DRGR. So here, I wanted to mention that for the Public Action Plan, grantees will primarily focus on the manage my grant module. So that's where grantees will log in and go to develop and submit and edit their public action plan and their DRGR action plan. So the manage my grant module is very important for grantees, so is to manage my financials module, and that's where grantees go in and submit their vouchers and draw funds against activities. And then the manage my compliance module also helps grantees review any system generated flags that.

Steven Edwards: Hana, we unable to hear you. Can you hear us?

Hana Nelson: Yes. Can you hear me now?

Steven Edwards: Now we can hear you. Yes.

Hana Nelson: Okay. Sorry. I'm not sure what happened. Should I go back to the slide before or?

Steven Edwards: Yes, please. Yes.

Hana Nelson: So on this slide, I was just describing the modules doing a breakdown of the modules in DRGR and explaining what each module does. We have listed here modules that are required to meet reporting requirements for grantees. And then we have modules that support meeting those reporting requirements. And on the next slide, I kind of get into some details on the modules. And so this slide is similar to the slide before, but it is important to note that the DRGR modules work the same, even with the addition of the public action plan for our seasoned grantees. And new grantees can use this slide as a reference to better understand all of the functions available under each module. But to kind of highlight each module and what happens. So under the manage my grants module, that's where grantees can go in and work to submit, develop, edit their action plans and QPRs.

To manage my financials is primarily used for grantees to create vouchers and draw funds against those activities. The home and my profile sections, display resources and action items and show user profile information. The administration module is where grantees can manage their DRGR user roles and

user information. The manage my compliance module is where grantees can go in and review flags and enter in those monitoring and audit NTA events. And then the data analytics module, which is our reports module also called micro strategy by some can be very useful for grantees to pull data related to financial and performance information that they've entered into the system.

I know many grantees access the reports module daily to assist them with administering these funds. So once you all are in the system, it's always good to just make sure you find some time to play around with that reports module, because it's very helpful. And so again, I just wanted to highlight this for our newer grantees. And I did just want to note again, that for our older grantees, our seasoned grantees, adding the public action plan, didn't change how these other modules work. And so our newer grantees if you have any questions, like I mentioned, we do have a lot of documents on the HUD exchange that kind of do a deeper dive on these different modules and functions within DRGR. But I just wanted to highlight that here.

And then before we get into a few FAQs and some additional topics, do a deeper dive on the public action plan. Because we were just discussing the different modules. I did want to mention here that under public law, 117-43 there is a new 15% mitigation set aside requirement for grantees. If you're not aware of this requirement, it is detailed in your applicable federal register notice. But here I wanted to mention that the DRGR team has updated DRGR to allow grantees to identify mitigation only programs and activities for tracking purposes. We do have a fact sheet on the HUD exchange that details this processed. But if you also have any questions, you can reach out to your rep. I just wanted to mention here that we did make some changes to accommodate this new requirement. And so it's something you all should pay attention to.

So, like I mentioned, after most of the sessions, we will have a Q and A slide or two, where I am going to myself or Jennifer, we're going to go over a few FAQs that have come in that we've heard as grantees have been using this system so far. And we're hoping that some of these are helpful. Some of these are things that I've discussed throughout the presentation already, but it's just, we've gotten several questions and inquiries on these topics. So I just wanted to make sure it was like crystal clear, and you can use this as a reference moving forward.

Question is related to what are some instances when a public action plan is not required. And like I mentioned, currently, the only grantees who are utilizing this public action plan feature in DRGR are the FY20 and FY21 grantees. So any grantees who did not receive funding under those appropriations, they are not required to use a public action plan. We've had people ask that question often. So I just want to make sure that's clear. And so once our FY20 and 21 grantees are awarded funds, should they.

Hana: ... they're awarded funds should they obtain access to DRGR immediately and review the Grant's Public Action Plan template prior to drafting the Public

Action Plan. So the answer to that question again is yes. So I've stressed that before, but it's very important that grantees are familiar with their Public Action Plan template before they're starting to draft their Public Action Plan in the system, just to ensure that they're collecting all of the data that they need, just to ensure that they're also populating and have a narrative for all of the applicable narrative sections.

We've had some grantees who didn't necessarily review the template in the very beginning and had to go back and write additional information or collect additional data, so I just want to keep stressing that point. Okay, so now we're going to get into some DRGR terms and definitions. And so by now, you guys are familiar with the Public Action Plan and the DRGR Action Plan, the differences. So this is another slide just to use as a reference. However, I will read the definition for a grantee program projects and activities just so it starts to become clear, because I know adding in the grantee programs has been confusing for some.

So the grantee program is a representation of complex programs typically categorized by activity categories like housing infrastructure, et cetera. Grantee programs offer a way to group and report cumulative data in illustrative dashboards. And so we actually have a few slides later in the presentation that does a deeper dive on grantee programs, but we thought it was helpful if you kind of had a complete picture of all of the terms that we're using.

So the grantee programs are developed with the Public Action Plan and then the DRGR Action Plan includes those projects and activities we've been talking about. So a project is the most common grouping of activities. Projects represent major programs or responsible organizations. And so again, I think I've mentioned activities will be associated to programs and projects. The grantee programs are included in the Public Action Plan, projects are included in the DRGR Action Plan.

And so last, going over an activity. So an activity is associated with one project and one granting program in DRGR like I just mentioned. And activities contain the most information used by HUD to monitor for compliance with programmatic requirements. So like I've mentioned, when you're drawing funds and creating vouchers Under the Manage My Financials, it's at the activity level. When you're entering in accomplishments, actual accomplishments in your QPR, you're doing that at the activity level.

So I just wanted to make sure that was clear. I know we've throwing around a lot of terms here. Some are new, some seem similar. So I thought that this slide would help kind of explain that piece a little further. Okay, so this slide is regarding the Public Action Plan sequence. So once you get started in the beginning, grantees should determine which grantee programs they are going to develop in funds and enter those into their Public Action Plan template.

We will show you guys how to enter those grantee programs into the system later in the presentation. But as far as starting the Public Action Plan, it's important that you make sure you create grantee programs. And then after that, you should go in and start completing the other narrative sections within the template. And so you'll go in and we have screenshots of the template that we'll show throughout the presentation as well, but it's important to note that creating those grantee programs is important, and then you start with your narrative sections and completing that piece.

Okay, so here is more information on the grantee programs. So grantee programs offer a unique way to group and report cumulative data in DRGR for the programs that are described in the Public Action Plan. This grantee program's feature is currently only available to appropriations using the Public Action Plan. So for those grantees with older appropriations, you're not using the grantee program feature in the system. So I don't want that to be confusing.

Once a grantee creates grantee programs and submit its Public Action Plan and DRGR Action Plan, grantees can review data, activity level data that'll be aggregated and displayed at the program level in DRGR, which I think could be helpful for reporting purposes. So I think that's one helpful tip or one helpful benefit of the grantee programs. So, for example, a grantee may have a single-family rehab housing program broken out into multiple activities within their DRGR or action plan due to national objectives and method of distribution, or responsible organizations.

And so setting up the grantee programs will allow those grantees to view data for all of the activities at the program level in DRGR, instead of having to go in and pull reports, or use other sort of functions or mechanisms to determine those projections and actuals for accomplishments and expenditures. So it's just another layer of cumulative data for your programs.

And here is a screenshot that we pulled from a grantees paper or published action plan that's on their CDBG-DR website. And basically what we wanted to show here was that you'll see here that the grantee has listed several programs within their paper action plan. And so these programs listed here are equivalent to the grantee programs we're developing or grantees will develop within their Public Action Plan. So grantees are familiar with their programs.

So the Public Action Plan grantee programs are similar to the programs that were previously included in the paper or hard copy versions of the action plan. And here is a screenshot from DRGR. And you'll see here that we have the Programs tab highlighted, and this is where grantees will come in and create their different grantee programs. And Jennifer will actually walk us through that process later in the presentation, but I just wanted to show you guys what the screen looks like since we were talking about grantee programs.

Okay, so now we're going to go into some FAQs and these are basically centered around the grantee programs as far as definitions. And so the first question is,

"Is there a program category for planning and where should those activities be housed?" And so the answer is DRGR does not have a grantee program type for planning or administrative activities. So you're not creating granting programs for planning or admin funds. However, you can reference those funds in the amount that you're spending in the narrative sections within the Public Action Plan template and within the budget tables.

So we had questions come in on that often, so I wanted to make sure that was clear. And then the next question is, "What are examples of grantee program types available to include in the Public Action Plan?" So the answer is grantee programs may include housing, infrastructure, economic development, public facilities, buyouts, public services, and/or mitigation programs that may be broken out even further by any applicable activity types. So, for example, a grantee may have a housing program, but they're creating a program in their Public Action Plan that is a housing, a single-family housing rehab program and also will be associated to that grantee program.

So next, I'm going to go over briefly the Public Action Plan workflow basically from start to finish, and this will be helpful. So we do have some steps in here they're for grantees. We also have steps that are for HUD staff, but I just wanted to make sure there was like a complete picture of the entire process here. So to start because the Public Action Plan is developed in DRGR now, grantees, especially any of our new grantees, they may have to request users in DRGR.

And if there are any questions related to how to set up new users in the system, that process is described in our user manual, which is on the HUD Exchange or you can submit questions to your HUD rep if you're confused or unsure of how to add those new users to the system. But while grantees are getting access to the system is necessary, the grantee is then completing its research and analysis to determine their DRGR needs and how they're planning to spend funds to address those needs.

And so once access is obtained in DRGR again, I want to stress the point that grantees should review their applicable Public Action Plan template to ensure that they are aware of all the information that they need to enter into their template to submit their Public Action Plan successfully in the system. So the grantee will then use the data and narratives and images, et cetera, to develop their Public Action Plan and DRGR. Then once all of the required sections are completed, they will then download a copy of the Public Action Plan and post it for public comment, which is required per the federal registered notice.

Once the public comment period is over and the grantee has made any final edits to the Public Action Plan in the system, the grantee will then submit their Public Action Plan for HUD review and approval. So once it's submitted, the grant manager or HUD rep will receive a system-generated email and notification within DRGR triggering the start of their Public Action Plan review period. So the HUD's review period of the Public Action Plan. So HUD will review and approve the Public Action Plan and DRGR, or they may reject or send the

grantee information or tell them information they need to change in order to receive approval of their Public Action Plan.

But once their Public Action Plan is reviewed and approved in DRGR, the grant manager is also reviewing and approving their financial certifications and implementation plan, and other information that was submitted outside of DRGR. HUD is completing our pre-award risk assessment tool outside of DRGR, and then executing the initial grant agreement with the grantee's.

So that's kind of that's HUD's process and the grantee's process as well. So once the grant agreement is executed, the grantee develops, which could also be happening while in DRGR prior to receiving the grant agreement, but they're going in and developing their DRGR Action Plan, which includes their projects and activities. And once the grant agreement is executed, they can go in, make sure all of their budgets are correct, and then submit that DRGR Action Plan in the system for HUD review.

So then HUD will review and approve the DRGR Action Plan. And remember earlier I was talking about the two different statuses, and so there's two HUD reviews in the system. So you just heard the Public Action Plan review, that's happening first before the grant agreement is executed. And then the DRGR Action Plan is submitted and then reviewed and approved by HUD. So once the DRGR Action Plan is approved, the grant manager or HUD rep will notify the DRGR team to release the remaining restrictive ballots. So basically the grant award, which will allow grantees to start expending funds, and will start the clock for the grantees submitting those performance reports and QPRs quarterly with their financial and performance data.

And so that kind of sums up the whole process. So you're submitting and receiving approval of your Public Action Plan first, grant agreement's executed, and then you are submitting your DRGR Action Plan for review and approval. Once it is approved, that's where you can go on and start expending funds and reporting on your accomplishments.

So the next slide is I'm going to start with an overview of the actual Public Action Plan module in DRGR. So from here on in the presentation, I know in the beginning we had a lot of words, a lot of background information we had to get out, but now we're actually going to walk through the actual screens in DRGR. The actual module where grantees will go in and develop those Public Action Plans.

And so I'm going to start with these first couple of steps and then I'm going to pass it over to Jennifer is going to walk us through the majority of the module. And so for our newer users to DRGR. So once you actually get into the system, grantees must utilize the locked grant feature at the top of the screen, which you see highlighted here to lock in whichever your new FY20 or FY21, or your consolidated grant before proceeding. And the first time a grant to use your attempts to access the Public Action Plan, there will be an option to select the

add action plan link. And so once that's done, from there on any grant to users working to draft the Public Action Plan will select the Managed Action Plan link, which is highlighted here to access both the Public Action Plan and the DRGR Action Plan.

Okay. And so tabs that are related to the Public Action Plan, where you will go in and draft this actual plan are highlighted in yellow here on this screen. And we're actually going to do a deeper dive on each of these tabs moving forward, but when it comes to developing your Public Action Plan, you're focused on the Narratives tab, the Programs tab, the Documents tab, and then also you're utilizing the uploads feature, which we will discuss later in the presentation.

And then when you're ready to work on developing your DRGR Action Plan, you're utilizing the tabs highlighted here in green, which are the projects, activities, and the uploads feature as well. So that is the overview and some background information. And now I am going to pass it over to Jennifer who's going to start discussing the Narratives tab and we'll make her the presenter.

Jennifer: Okay, great. Thank you, Hana. How's my audio sounding?

Hana: It sounds great.

Jennifer: Okay, great. So this is the section we're going to walk through those tabs that Hana noted on the last slide that constitute the Public Action Plan. So the Narratives tab, the Documents tab, the Programs tab, the Documents tab. So let's get started on talking about the Narratives tab. So when you're in your Public Action Plan, your screen is going to look like this. This is after going into the Managed Action Plan function, which you can access through that Columns icon on that top blue bar, click on Managed Action Plan and it's going to take you to this screen.

On the screen, you can see these tabs across the top beginning with the Narrative tab that's highlighted here in the blue with the red box around it. On this tab, you have basically your Public Action Plan template. And so users will need to complete all of the fields that are marked with an asterisk on this template. And you can see those asterisks there on the left side of the screen, they're highlighted with the red box around them.

Each of these sections here in this narrative template represent the same types of sections you would have built-out in your Public Action Plan that if you have received disaster recovery funds in the past, you'll recall creating your Public Action Plan [inaudible 00:47:30] and you would typically do that in a Word document or something like that. [inaudible 00:47:34] out here in this template.

So what it really does is just take that old Public Action Plan and create it in DRGR. So it sort of is helpful in my opinion, it really streamlines things for you because it's all right here in the system. And you just walk through each of these

sections of the narrative template and complete them with your narratives. So in order to complete these narrative sections, you're going to see this Status column way over here on the far right. In that Status column, you're seeing that some of them are marked completed. Some of the sections are marked pending, and we're going to talk more about those as we go through these slides in terms of the status.

But that last column there is the Action column, and you'll see the little blue pencil icon in order to access each of the individual sections of the narrative template, you're going to click on that action column and it's going to open up the fields to complete for that section, and we're going to show you what that looks like in just a moment. So this is a little bit of a zoomed inversion of what the different sections look like. As you can see, there's a section here on the grantees proposed uses of funds, and then you have your subsections down here and then the appendices as well.

And as I said, you're going to go through each of these sections with an asterisk and make sure you complete them. When you do complete them, they'll be marked complete in your editable section. I'm going to show you that in just a moment, but you're going to see the status over here on this summary page. So it'll say completed or pending. And before you're able to submit your Public Action Plan, all of these sections that are required will have to be marked complete.

So this is actually like a nice visual checklist for how you're doing on completing your Public Action Plan in DRGR. You can see at a glance, which of your sections still need to be completed, which are still underway. This is also helpful if you have a few people helping to build-out your Public Action Plan in DRGR, because you can see which sections still need to be done so that the folks that are assigned to those can keep working on them.

All right, so let me go back one slide. So as I mentioned, when you want to go in to work on a section, so you want to go in and complete the overview for your grantee proposed use of funds, it's a required section. You're going to go over and click on that blue pencil icon in the Action column. When you click on that blue pencil icon, it's going to open up the narrative fields that need to be completed for that section. It kind of looks something like this. As you can see here, you have some narrative boxes that you can enter your text into.

You also have some just formatting and very much like Microsoft Word type of functionality here at the top. So in this functionality, you can do things like bold the text italicize, underline, you can format the paragraph so that it's right, center, left, fully justified. You can add bullets, you can add numbered lists and you can also enter tables. And we're going to talk about tables in a moment, but that's a very useful feature that we're going to go over. You can add links and you can also add images.

So all of these different functionality for formatting are here. So this gives you a lot of user-friendly options for making the text in your DRGR Public Action Plan look just like it would in Word. And then, of course, you can also use these functions through these dropdowns at the top here. And then as you can see in this document abstract box, there is some italicized text here/ and in the italicized text, you're going to see some instructions for how to complete that particular section of the narrative. So keep an eye out for those italicized prompts that can help you understand what you need to do for that section.

We're going to talk in a moment about some text that is in the template that will need to stay there, but a lot of what you're going to see in these narrative fields, if it's in a italicized instruction, you can remove that. But we'll talk about some boilerplate text that HUD would like you to keep in the document. And then finally as you see down here on the status box here, this is still marked pending. But once this is complete, just click on this dropdown and change the status to complete, and that's going to change the status in that summary view that we just looked at from pending to completed. And that's where you can really keep track of how far you are on completing your overall Public Action Plan.

So as I mentioned, when you click on the Action column, it opens this editable template, and this is where you're going to complete the fields and also to change the status for that particular field from pending to completed once you're complete. You always want to remember to save and the save button is over here on the lower right-hand side. Make sure you save your work and then it'll be there when you come back.

So remember I mentioned tables. So tables are a really useful way to share information. This screenshot is showing you that in this field here that says document title, you can add a table. And so there is the table icon up on the toolbar here, it looks just like a spreadsheet, you click on that and you add a table much like you would in Microsoft Word. And so you can add the tables, add the columns and rows that you need. It's important to understand that this functionality exists, because if you do have a say you're building out your Public Action Plan in a Word document before you enter it into DRGR, you may have built-out a table in that Word document.

You don't want to copy and paste that table into this narrative field. The formatting's not going to work so well. It's going to give some really strange characters when your HUD rep goes to look at it. So if you've created a table in your Microsoft Word document when you go to put it into DRGR, make sure you actually create the table here in DRGR so that it's a nice clean formatting to the document when your HUD rep goes to review it. So just a tip about when you're getting ready to copy and paste things from Word, make sure that you skip copy and pasting the tables. Just go ahead and build those tables out right in the system and that's going to give you the best formatting.

All right, so I mentioned before that there are places where you're going to see instructions in the narrative template fields. And so some of those instructions are right in the narrative box in italicized text. They're going to read like instructions. You can go ahead and take those out. But every once in a while, you're going to see some boilerplate text in the narrative boxes and here's an example.

So this boilerplate text is not italicized. It's in standard font, but there is an instruction here that says, "Please do not overwrite or add to the boilerplate text other than the grantee specific information at the underlined areas." And so you want to make sure that where you see that instruction box to not remove the boilerplate text that you keep that boilerplate text in there. Okay.

Speaker 1:   All right. And again, this is just showing you where you can mark that status as completed. Remember that you will need to have a completed status on every section of the narrative template before you can submit your public action plan to HUD for review and approval. So as you walk through your narrative template, you're going to see some HUD required tables.

So I mentioned that as you're building out your narrative, you can create your own tables within the narrative to share information with HUD. But then there are also narrative tables that are pre-populated in DRGR that are asking you to provide HUD with specific information. And so this is a screenshot of one of those required tables that is populated into the narrative template. And you're going to have to gather that information and then enter it into the narrative table that's in DRGR.

So this one is asking to identify the type of damage, number of properties, number of units, number of assisted units, number of units on a waiting assistance. And then you'll fill in those boxes. You'll also include the data source. So wherever you collected this data from, you're going to enter it there in that box to let HUD know where you found that information. And then again because this is a field in the narrative template, you're going to be marking this completed once it's complete.

All right, so let's talk a little bit about table tips. I think tables are something that have generated quite a few questions for grantees. So we're going to just kind of review some of the things that have come up for folks so that they might help you going forward. So on those pre-populated tables that I just showed you, so on that very last slide, this field here. This is a table already in the template on the tables that look like that, grantees may not have data to populate or determine the required template tables, or they may determine that the required template tables are not applicable to their grant.

So you want to include any information here for the public, your CPD rep or your grant manager to understand the determination that those tables are not applicable. So you want to make sure that you're sharing information with your HUD rep. And that's just true generally with respect to developing both your

public action plan and your DRGR action plan. You always want to be communicating well with your HUD rep about the content that's in your document. So again here, if you determine that the data in a table is not required, doesn't apply, you just want to make sure you explain that. And you can populate those tables with zeros or with text if something is not applicable.

So grantees also have the ability to create their own tables to include additional data in the narrative sections. And that's how I showed you just a moment ago about how to create tables just like you would in Word, you can do that right in the narrative sections. And the tables can be formatted to add additional rows, but this is for your preset tables that are in the template. You can add additional rows, but the columns are set. So, for instance, back here on this. If this were a pre-populated table, some of them do allow you to add additional rows, but these columns with the kind of data that HUD is requesting are always going to be standard. But some of the tables will allow you to add additional rows if you have additional data.

And so questions about required tables should be discussed with HUD or your HUD CPD rep, and then forwarded to the HUD DRGR team if it is a system defect, or if there's some sort of error or glitch you're getting in using the tables, then the DRGR team will be notified so that they can help to troubleshoot that.

All right. So let's talk about a couple frequently asked questions around the narratives. So one question that's come in frequently is, "Can formatting be done in Word and carried over into DRGR without the formatting being lost?" So, unfortunately, DRGR does not recognize all formatting used by Word. So you will have to reformat some of the text. Like I said, you'll want to create the tables right in DRGR. You might need to upload graphics. You can't just copy graphics over into the narrative boxes, so you will need to do a little bit of formatting.

The best practice is to assume that most tax copied over from Word. You won't need to do much formatting, but be prepared to manually create the tables, add the graphics and images by using those image upload boxes and things like that. So most of it will be okay, but some of the more fancy things that you might want to be doing in your narratives, you may just have to create directly in DRGR.

All right, another question. "Can grantees add graphics, maps, and branding within the public action plan and is there a size limitation when it comes to Word and character count for the images in the DRGR and public action plan?" So the answer is, yes, grantees can add graphics, maps, and branding. The only restriction is the image uploads that are limited to 500 kilobytes per image. So you do have a little bit of a restriction on how large your images can be, but you can definitely add those graphics, maps, branding. As I said, you'll want to use the little icon where you actually add the graphic, because just copying it into the narrative box isn't going to work.

All right. So now we're going to move on to that next tab in the series of tabs. Remember we said that for our public action plan, we really build it out through three tabs in DRGR in our managed action plan function. We're building it out through the Narrative tab, which we just discussed. We're going to build it out through the Programs tab, which you're going to talk about now, and then we'll talk about documents next.

So in the Programs tab, that's that second tab there across the top. And Hana talked to you earlier about the programs in your public action plan and those being a really important first step in establishing your public action plan. So one of one of the first things you're going to do when you start creating your public action plan is create your grantee programs.

So you're going to do that under the Programs tab right here in the managed action plan function. And over here on the right-hand side, you're going to see this link that says Add Grantee Programs. So you're going to click that link and you're going to get an open box where you're going to complete the details for that program. Now, your appropriation and your grant number is going to be pre-populated. Those are those gray boxes at the top, but you're going to have to select what is your grantee program type from the dropdown.

And so we have here a list of pre-populated grantee programs. And for this one, they're going to select housing program, but as you can see there's a buyout program, economic revitalization, infrastructure, public services, public facilities. So several programs there to choose from. You're going to select that from your dropdown and then you're going to give the grantee program a name. So this is a free field here, so you're going to actually create the program name to fit any naming conventions that you have. So this is the Hamlet of Captain Hook, and then you're going to enter your budget information.

So if you are familiar with working in DRGR and the regular DRGR action plan, you're going to remember that in your activities, you create a budget. And for your DRGR programs, your budgets include also most impacted and distressed area budgets. And so you're also going to include those mid-threshold budgets here in your budget build-out as well for the programs.

All right, and then once you've created your grantee programs, you're going to be back here on your Programs tab, and you're going to see those grantee programs summarized on this tab. And so here in this box, you can see there are two housing programs that were created through that process that I just described. When you enter the grantee programs, you're going to have a lot of summary information on this page. It's going to tell you at a glance, your proposed budget, it's a proposed unidentified mid-budget, the proposed grantee identified mid-budget. And then within these programs.

Once you start to build out your activities, the activity information, the aggregated activity information will be visible here on the Program tab as well.

So you'll have your activity budgets, obligations, draws. All that information will be summarized here once you start to build that out so it's a nice little snapshot.

Okay, so now let's talk about the Documents tab. That's that third tab in the series of tabs that you're going to be utilizing to complete your public action plan. So the Documents tab is really a place to upload additional documents that are useful in building out your public action plan. Things that you want to reference in your public action plan, things that maybe don't fit in the field that are available, maybe there is word or character limits. Or maybe there are just additional photographs or things like that you want to add. You can add them here through the Documents tab.

And to do that, you're just going to click the Add Documents link over on the right side. And once you populate the documents, you're going to see them here in summary fashion, they'll all be listed. And we're going to talk about using this page here a little bit more as we go through these slides. So once you click Add Documents, you're going to have this pop up here that says Add Supporting Documents. You're going to choose the file. You're going to decide first whether that file is going to be public or private.

If it's private, only those assigned to the grant are able to review it. If it's public, anyone that see your grant can look at those supporting documents. So you mark it private or public, then you choose your file from your computer. And there on the right side, you can see a list of documents on this person's PC. They're going to choose the file that they want to upload into DRGR and then click open.

A couple things to remember about supporting document uploads. They are limited to three megabytes. And again, for public, anyone with access to the grant can see the attachment. And then for private, only assigned CPD representatives can see the attachment. Now back on that supporting documents page I showed you how all the documents will be summarized. Once you've uploaded them, you're going to see a list of the documents that have been uploaded. And at the end, there's an actions column.

So let's just kind of walk through that actions column so you understand what each of those little icons will do. The first icon is a trash can icon, so it does what you might expect. It allows a user to delete a previously uploaded document. So if you go through the process of doing an upload, you accidentally choose the wrong document from your computer, you can easily delete it just by clicking on the trash can icon.

That little eyeball icon there is going to allow you to download a copy of the document once it's been uploaded. So if your HUD representative is reviewing your plan and they want to be able to download a copy of a document that you've uploaded because it's easier than looking at it on the screen, they can easily do that by just clicking that eye icon for the download.

And then the pencil icon allows you to edit the supporting document. So if you see here to the right, if you click on that pencil icon, you're going to get a popup that allows you to edit that document. So change the access type, for instance, from public to private.

All right, so that's basically all you need to know about document uploads. There's also a feature that allows you to add supporting links. So say, for instance, that your organization did a study that you're referencing in your action plan or that you want folks to be aware of about that influences your action plan in some way, you can add a supporting link directly to the site where that study is published.

So rather than downloading a giant file, maybe it's a really large file and then trying to upload it, you can actually link to a website. And so to do that, you go to the supporting link section of the Documents tab, click add link, and then you'll be able to add the name of the link and then the address for the link, the URL, and then save it. And once you do that, you're going to see that those links are listed here in summary fashion. There's a list of the links.

Again, if you want to view the link, you just click on the eye icon and it gives you a popup. It's going to warn you that you're leaving DRGR to access that external link. And then the link will open in an additional browser. And again, the trash can icon removes the link. But if you choose to open that link. If you've clicked on the eye, it's going to open in that separate tab, take you directly to the website that is linked in DRGR. If you had clicked on the pencil icon, again, that's going to allow you to edit the link. So if you go in and test your link and it doesn't take you, or you thought it was going to, you can always go back in and edit that link to add the correct address or to change the title if you want to give it a better title.

All right, so that's an overview of the Documents tab and so let's go over a few FAQs that we've gotten from folks over time as they've been using this feature. So one question is, "Are documents uploaded via the Documents tab included in the downloaded copies of the public action plan?" So, no, when you go into download your public action plan, which Hana is going to talk about in a little bit here. When you go in to download your public action plan, it's not going to download all of those supporting documents with it.

However, you can make reference within the public action plan narrative sections if you want to be sure that your HUD CPD rep or other grantee users in DRGR should review those supporting documents to get a full picture of your public action plan. So again, they won't be downloaded through the download feature, but you can flag those in your narrative section so that anybody reviewing knows to check the Documents tab and then access those separately.

So another question, "If graphics images or maps exceed size limit for upload directly into the public action plan template, how should grantees proceed?" So this is a great use of the supporting documents feature. Grantees should

attempt to decrease the size of the graphic image or map so that they can get it into their narrative. But if that's not successful, you can upload those files via the Documents tab and notify your CPD representative. For instance, the required SF-424 signature, that's going to be uploaded in the Documents tab.

All right, so we're going to go on now to our final piece of the public action plan. As we mentioned before, we have our Narratives tab, our Programs tab, our Documents tab, that constitutes the main sections of the public action plan, but you also must utilize the Uploads tab. And we're going to explain why here. So the Uploads tab is going to be located at the very end of the row of tabs in your managed action plan functions. The last one says upload. You're going to use this tab whether you're uploading for your public action plan or your DRGR action plan, it works for both, but we're going to talk specifically here about using it for your public action plan.

And so one of the first things you do when you go into this tab is you'll see here that you can select your upload type. And this upload type is going to be representative of the upload template that you're using. So in this case, you are always going to be using the upload template for projections of expenditures and outcomes. And so you can do a simple Google search for DRGR data upload templates. Here's the web address for data upload templates, but all users who create a public action plan will need to use these two templates. It's not optional. You will have to complete the templates and upload them into DRGR.

So a couple notes about that. Once you've added your grantee programs as we just discussed, you can upload your expenditure and outcome projections using this Upload tab. In fact, you'll need to do that. It's important to note, I'm just going to repeat it so everybody understands that using the upload templates is the only way to get this information on projected data into DRGR. So you will have to get comfortable with using this feature.

So the upload format layout is pretty simple. There are three sections here. There's an upload type, which you see in the dropdown there, and that's going to mirror the template that you selected. There's also supporting information and then there's a file upload control. And that's down here at the bottom of the screen. So the upload type contains a list of the action plan upload templates. The two that we're going to discuss today are the expenditure projection, add an edit template and the outcome projection add an edit template.

So when you're uploading expenditure data, you're going to use the expenditure projection template. And when you're uploading outcome data, you're going to use the outcome template. So there are two separate templates, and again, you can access those templates by downloading them from the HUD Exchange and the address is there. You could do a simple Google search.

Now, the supporting information section here, you'll see a link there on the right side, a little button that says supporting info. The supporting information

section has a button there that provides the existing data in DRGR that's already been entered. So if you went in and you entered some information already, but you need to add additional information and you're using the template to add that additional info, and you just want to double-check on what you've already put into DRGR, you click on supporting info and then that's going to tell you what's already in the system.

And then finally here at the bottom, once you've populated your template, which we're going to talk about on these next slides. But once you've populated your template and you've saved it to your computer, you're going to click choose file. It's going to open your search box for your files on your computer. You're going to choose the proper file and then when you're ready, you're going to click upload and that's going to upload all of that data into DRGR.

So as I mentioned, there are two required templates for completing the public action plan and that is the data upload template for expenditure projections and another for outcome projections. So let's take a look at projected expenditure template. This is the template you're going to use to upload your projected expenditures. On this template, which again, you can download from the HUD Exchange. There are four fields so you're going to have your grant number, you're going to have your grantee program name.

Remember when we created our grantee program, there was that field for program name, and we created that based on our own naming conventions. So that's where that's coming from. So your grantee program name. And just a tip with templates. Any data that's in DRGR that the template needs to connect with has to be on your template in exactly the same format. So for instance, in this example, the grantee program name is GP1 and there's no spaces between any of the characters. If that's the way it's written in, DRGR, that's exactly the way it needs to be written on your template. If it's written that way in DRGR, but on your template, you put a space between the G and the one.

DRGR is not going to recognize that you're talking about the same thing as what's in the system already. So it's very literal. So it's looking for GP1 with no spaces, you're giving it an extra space and it's going to return an error. So just be careful with this field. Make sure that you are putting in your grantee program name exactly the way you've entered it into DRGR when you set up your grantee program.

Another field is the quarter start date. So this is the start date for the quarter that you're going to be projecting information for, and then the projected amount in the last column. So those are your four fields for your projected expenditure template.

The next template we're going to talk about is the projected outcomes template. It works just like the other template, but on this one there are five fields. And again, you have your grant number, your program name, your quarter start date, and then you're going to have the different measure types

here, and then you're going to enter your proposed totals. So over here on the side, you're going to see just a little kind of a cheat sheet that shows you for the different grantee program types the kinds of performance measures that are required.

So for buyout programs, you need to enter the number of properties and the number of households. For economic revitalization programs, you need to enter number of businesses, permanent jobs created, permanent jobs retained. For housing programs, you'll have the number of affordable housing units, number of elevated structures, properties, substantially rehabilitated units as they apply to the programs that you're using. So those are just on the side there, the different types of performance measures associated with the various program types.

All right, so let's talk a little bit about upload results and debugging. So for those of you who may have worked in DRGR before and used data upload templates, I think some people can get a little bit frustrated with them, but they really are a marvelous tool and really easy-to-use if you just know some tricks. And the tricks are that you want to be careful about how you put the data on the template. So you never want to change any of the columns on the template, leave them exactly as they are.

You always want to use the file format CSV. Don't change the file to an Excel file. Make sure it stays as a CSV file just as HUD created it. And then again, any information where the template has to connect with existing info in DRGR, make sure that you've put it on the template exactly correctly. So your grantee program name, make sure it's entered just as it is in DRGR. And if you follow those simple tips, you will be successful nearly all the time.

People get frustrated when they kind of are not as careful about entering some of that information that already exists in the system. And that's when they get a lot of the errors. But once you do your upload, DRGR will tell you whether you've been successful, whether you've been partially successful or if you are unsuccessful. And so if you were successful in this first box here, you're going to see it says DRGR data upload, number of file rows in your template was one and then the uploaded number of file row was one. So you completed this successfully. All the rows on your template actually were uploaded into DRGR. So congrats, you're done with that one.

Let's take a look at an example, though, where you were only partially successful. That's that middle data upload box. In this one, there were 24 file rows on our spreadsheet, but we only uploaded 22 rows. So this was completed with some errors and it's going to tell you that in the status of the upload field. And then let's just take a look at this next box before we move on to what we do if we're not fully successful. So say we uploaded-

Jennifer:	... too, if we're not fully successful. So, say we uploaded a file, it had one row, but none of the rows uploaded. So we got a zero upload. So that's a little frustrating. It's going to tell us it was completed with some errors.

So, how do we figure out what went wrong? As you can see in this middle box, where it says there were 24 rows, but only 22 uploaded, you can see a small link there that says download, upload details. If you click that, it's going to download a spreadsheet that gives you line by line, what happened with that line. So either you were successful with that line, it will say successful. Or, if that line did not properly upload, it's going to tell you what the error was. So this particular one says error, one or more fields have no or empty values. So, perhaps in this one, the folks, when they created their spreadsheet, they accidentally missed the field. And so it wasn't able to upload that full data set because there was information missing.

So this download is going to tell you exactly what's going on with your errors. If you download this and you don't understand what is going on and why you got the errors, you can always consult with your HUD CPD representative, or you can submit an AAQ to the DRGR ask a question and someone can help you figure out and troubleshoot those errors. Now, once you get the data uploaded into DRGR, so you've had success, there is going to be another link that says view, upload data, and that's over there at the bottom right hand side. If you click on that view, upload data, it's going to show you what actually made it into DRGR. It's going to summarize all the data that's been uploaded. Okay.

So that's how you navigate through situations where you may not have been fully successful. But the system will tell you if you've been successful or not, how many rows actually got into DRGR. If you didn't get them all in you click that, download upload details link. It's going to give you your errors. And then you can begin to troubleshoot by going back to your original template spreadsheet and starting to clean that up.

All right. So here's an example of upload results. So as I said, you can download the upload details and so you can see exactly what was entered into DRGR. And so here's an example of the expenditure information that's been uploaded into the system.

All right. And with that, I will turn it back over to Hana, to talk about downloading and submitting the Public Action Plan.

Hana:	Perfect. Thank you so much, Jennifer. That was great. So I am going to wrap us up here with starting to discuss downloading and submitting Public Action Plans in DRGR.

And so, because Jennifer just went through all of the different tabs, at this point grantees, once they've completed all of the applicable tabs and entered in the data that Jennifer was just discussing, the grantees should have a complete

Public Action Plan in DRGR. And so I included here just a high level overview of the sections included in Public Action Plan templates. And just remembering, like we've been mentioning, templates may be unique for grantees. And so that's why this is not a detailed list, but this is overall what should be included. This is a good slide to reference, if necessary.

Okay. So in order for grantees to actually go in and download a copy of the Public Action Plan, users will select the green Public Action Plan link highlighted here in red on the managed Action Plan screen, in the top right hand corner next to the Submit Plan button. So here's where you go in to start the downloading process. Then grantees will have the option to download a copy of the Public Action Plan into a PDF, which is highlighted or identified by the number one icon you see here on the screen. And then the second icon allows green tees to download a word copy of the Public Action Plan, like we've been re referencing. And again, the word version will allow for if there is some need for additional formatting outside of the system, we can do that using the word version before posting onto the grantees CBDGR website, and the word version also helps allow grantees to put that document up for public comment. And then also with the language translation services, if they're required, like I mentioned earlier.

Okay. So, I've walked through how to actually download a copy of the Public Action Plan. It's pretty straightforward. It's just a matter of knowing where those links are. But so once you've downloaded a copy and you are ready to actually go in and submit the Public Action Plan, a grant to user with the submit Action Plan role tied to their user ID will see the green link highlighted here in red with the red circle that says submit plan. And so that is the button that a grantee should press in order to start the process for submitting the Public Action Plan.

And it's important to note here that if you do not see the submit plan button, you may not have the submit Action Plan role tied to your user ID. And so you within your organization and working with your HUD Rep should make sure that at least one person within the organization has the right to submit these Public Action Plans.

Okay. And so once the user clicks that submit plan link on the previous screen, that will populate a modal, which you see here, which is called the submit Action Plan for review screen. And grantee should ensure here that Public Action Plan is selected and they enter any descriptions or submission comments for HUD review and then press the green submit button at the bottom here. After the initial Public Action Plan submission, the amendment title, which you see here under amendment type will update based on future amendment submissions in the system. So you'll see for the first review, it'll be listed as the initial Action Plan submission. And then following that first submission, the system will then start to identify this version of the Public Action Plan as a substantial or non substantial amendment to the Public Action Plan. And so you'll see here on the screen, there is an option to select substantial versus non

substantial amendments. And I'll go in a little deeper on those amendment in a few slides.

So the next two or three slides, pad slides, but I think it's helpful sometimes to of see what your Grant Managers are seeing in the system as well during their review process. So once the Public Action Plan is submitted in DRGR, the Grant Manager will be notified via email, and they'll actually have action items that pop up on their DRGR homepage, which we're showing here. And so once the Public Action claim is submitted, your rep will know that it's been submitted. We do have some grantees that also send their own separate emails, notifying their grant manager that has been submitted, but you'll see here, the submission date will be included, how many days the Action Plan has been submitted. So this is helpful, and this is how your Grant Managers see that your Action Plan has been submitted, for one option.

So next, this is part of a review screen that HUD sees on our side. And so you'll see here, they have the option to go in and change the status of the Public Action Plan to reviewed and approved. Here as well they have the option to enter in comments. So if they had any review comments that they wanted to provide you as a grantee, based on their review of the Public Action Plan, they can add in comments here and supporting documents, and then they also have a checklist completed in the system. So I just wanted to show you guys these screens, so you just saw what your HUD Rep sees in the system when they're going in and actually completing their process at reviewing and approving the Public Action Plan.

Jennifer: Okay. So now I'm going to, we have a few FAQ questions related to downloading the Public Action Plan. And so the first one is, which we've received a lot of questions on this, will a table of contents and page numbering be automatically produced when documents are downloaded from DRGR. And so the table of contents is automatically produced within the Public Action Plan. However, the page numbers will have to be added separately. So that's something where additional formatting in word could be helpful before posting onto a grantee's CDBGDR website. And page numbering may be something that we include in the future. But as of right now, the system will not populate those page numbers.

We also had questions come in just about the public comment process. And I just want to make sure it's clear that grantees and citizens won't have access to DRGR or the Public Action Plan in DRGR. So again, that's another reason why it's important to make sure you understand how to download a copy. You can download a word copy to change up the formatting, fix anything that you may want to fix. And then you're able to post that copy to your CDBGDR website, just for transparency purposes. And so citizens in the public can understand where you're spending your DR funds.

Okay. So another set of questions. So when the Public Action Plan is downloaded, the PDF or word version, will the file be ADA accessible? And the answer is yes. So the downloaded copy will be ADA accessible, which makes it

easier for when you're posting it for public comment and posting it on your CDBGDR website.

And then the last question here is, is there a place in DRGR to upload public comments received from the Public Action Plan? So, within the template, you'll see there's a section to include a summary of comments that have come in, public comments. But there's also, if you wanted to attach a complete list of those public comments that have come in, you have the ability to upload a document via the documents tab as Jennifer went over earlier in the presentation.

So now I'm going to end with briefly talking about Public Action Plan amendments, and then we'll get into some resources.

Okay. So once a grantee has submitted their initial Public Action Plan in DRGR, it is expected, I'm sure we all know that grantees will amend their Action Plans as they progress throughout the grant. So, we almost consider this the Action Plans working documents to an extent. So, any changes made to the Public Action Plan narratives or programs tabs in DRGR will trigger the Action Plan status to change to modified, resubmit when ready, as you see highlighted here. And so it's just important to note that if you do modify your Public Action Plan at any point, you will have to resubmit, that Public Action Plan, that version with the updates for your HUD Rep to review and approve. So that status will then change back to reviewed and approve.

And so again, if you do go in and make changes to your Public Action Plan to those two tabs, when you select the submit plan link, as you see highlighted here, it's the same link as I showed you before, that will then populate that same modal, as I showed you before. And here is where you can go in and identify your next submission as either non substantial or substantial. And there's language in your federal register notice, and within your actual Public Action Plan describing what triggers a substantial amendment versus a non substantial amendment. And there's also a place in here where you can add a description of any updates or any comments related to what changes you made in the Public Action Plan. You can add that in here, where you see the text box. And then, it's pretty straightforward. It's just a matter of selecting which type of amendment, and then adding in what updates you made to the Public Action Plan. And also, like I mentioned earlier, the amendment title will update based on your submissions.

So if it is the initial submission, you will see initial listed here. But if you continue on with three substantial amendments and 10 non substantial amendments, that amendment title will update based on those submissions.

So once this is filled out, you submit the Public Action Plan, the same way as I showed you earlier. You click this submit button and the substantial amendment or non substantial amendment will be submitted for a HUD Rep review and approval. The substantial amendments require your HUD Rep to

manually go into the system and change the status to review it and approved. But for non substantial amendments, if five business days pass the system will automatically approve those non substantial amendments. So it's important to make sure that you're selecting the correct amendment type when you're submitting these amendments. And if you have any questions on that piece, that's something you can talk to your HUD Rep about, or it's good to start with your HUD Rep on that topic.

OK. So now we have two, these are our last two FAQs related to amendments, and I'll just read them here. So the first one is, will the DRGR system allow grantees to download amendments out of context to be posted to the grantee website separately. And so the answer is each Public Action Plan download will include an amendment page if applicable following the cover page. And that will only include the most recent amendment and changes listed. But amendment pages can be extracted from older versions of the Public Action Plan and included in a document to post to your CDBGDR website, if necessary. So that's where it's good to the option to download your Public Action Plan into PDF and word documents, because then you're able to manipulate those documents for posting onto your DR website.

And the last question is, is there a track changes option with the Public Action Plan sections within DRGR or another version control tool for edits? And so this is not a function presently in DRGR for [inaudible 01:42:22] Action Plan, but we're hoping we can incorporate something similar, something helpful as far as tracking changes with future enhancements. So I just wanted to point that out. I know we've had people ask about the track changes and that's just not something that the system has the ability to do at this point.

Alrighty. So now I'm going to talk about a few tips and resources, general tips and resources, and that'll allow Steven some time to wrap up his questions because once the webinar ends and we're logged out, we can no longer answer questions via the system. So we will have to follow up either via email or through your HUD Rep, depending on the question.

Okay. So a couple of tips. We've been talking about, I think it's always good to just download a copy of the Public Action Plan, just say for your records, just so you have the data that you entered into the system and you'll have a copy based on what you're putting on your DR website. But I think it's just good to just keep a copy internally outside of the system.

Those of you familiar with DRGR are familiar with this timeout system, timeout that's built into the system. So, if you're in the system working on your Public Action Plan - drafting, adding narrative, adding tables, whatever you may be doing - it's just good to make sure, good practice, if you step away or know that you're not going to be active in the system for a while, it's good to go ahead and save what you're doing and then log out so that you're not potentially losing any information. So it's just good that you know that that 20 minutes inactivity system timeout is there. There is a modal that pops up that gives you a warning

that the system is about to log out, but it's just good to make sure that you are paying attention to the clock while you're working on these Public Action Plans.

Then I just added a note here about micro strategy reports, just stressing, especially for our newer grantees to make sure you're familiar with those reports in micro strategy. We have a really good fact sheet on the cut exchange, which is the crosswalk, which basically describes all of our reports and what's included in those reports. We also have some recorded webinars on how to use micro strategy. So, just another plug. It's very helpful, especially once you've developed your Public Action Plan, developed your DRGR Action Plan and you're in the day to day mode of spending these funds.

And then here, just stressing again that we do have documents that are helpful on the HUD exchange that explain all of those modules that I talked about that are not related to the Public Action Plan and DRGR Action Plan. So just become familiar with those resources. We didn't cover a lot of policy and programmatic guidance during this training. It was strictly just how to use the system in building out the Public Action Plan, but you have questions, policy or programmatic related questions, always refer to your federal register notice or reach out to your HUD Rep.

And that's my last tip here. I just want to make sure grantees are reaching out to their Fund Reps and Grant Managers when they have questions, especially DRGR related questions. It's good to start there. And then if your Grant Manager is unable to answer, the Grant Managers will forward those questions, obviously DRGR team and we will help out and get an answer.

And here are just some helpful resources. We've talked about resources throughout the entire presentation. We have the user manual, we have the DRGR fact sheets. We also have some previously recorded webinars on the Public Action Plan, and there's also a lot of good resources and fact sheets on the [inaudible 01:47:14] of 2020 and 2021 CDBGDR grantees resources page, which I'm familiar with. There's policy related documents there. DRGR. So, that's a really good resource, if you have any questions. Good place to start.

I think that wraps us up for this afternoon. If you do have additional questions that you were not able to ask during this training, like I mentioned before, always reach out to your, your HUD Rep and we'll try to get you answers as quickly as possible. And I think that wraps us up for the afternoon. I'm going to give Steven a minute to maybe finish his last question, if he's still typing away, but I want to give a big shout out to Jennifer and Steven for helping me out during this presentation. Hopefully it's been helpful to our grantees, and I think that's going to wrap us up for the afternoon. I appreciate everyone taking the time.