

DRGR FACT SHEET: Release 7.13 Action Plan Review

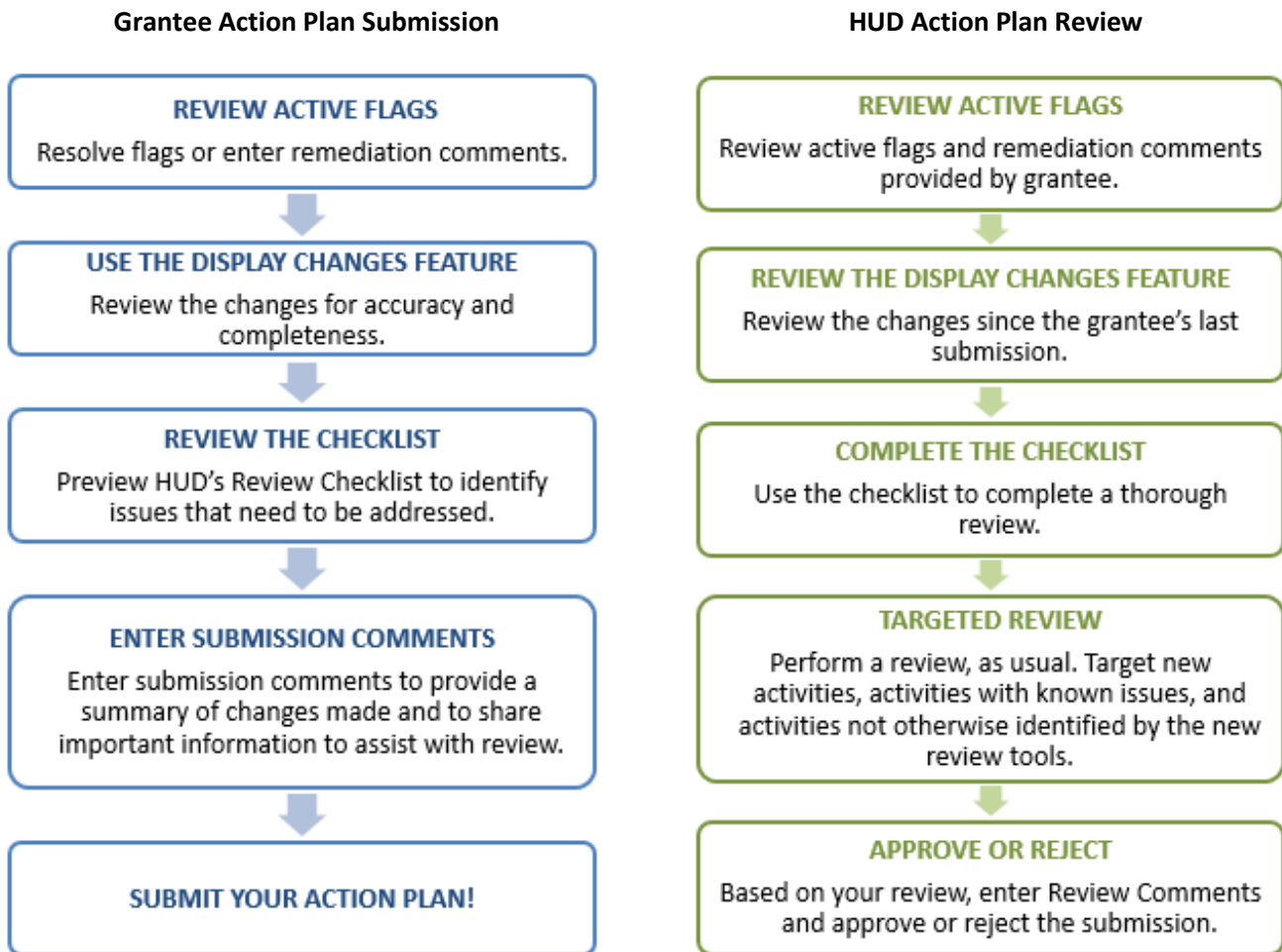
Background

With Release 7.13, several new tools were added to aid grantee and HUD users with submission and approval of quality, accurate, and compliant Action Plans and QPRs. This Fact Sheet focuses on Action Plans, but most concepts and functions apply to QPRs as well (see separate QPR Fact Sheet).

These new tools should be used regularly to reduce and eliminate active flags and other issues identified in review checklists. The new features will not prevent grantees from submitting Action Plans. For HUD users, mandatory functions will be clearly displayed for review and approval of Action Plans.

The following figures depict the basic work flow of Action Plan submission (grantee user) and review (HUD user).

NEW ACTION PLAN WORK FLOW



The following table describes the new Action Plan Work Flow features in greater detail:

LOCATION GRANTEE	LOCATION HUD	FEATURE	FUNCTION
Edit Action Plan - Review Tools Screen	Action Plan Review Screen	Active Flags	Grantee users can see a summary of flags from the Review Tools function. Note that grantee users edit Flags from the HOME module. HUD reviewers can see all active flags related to the Action Plan and provide comments on those flags. See Fact Sheet on Flags
		Action Plan Review Checklist	Grantee users can view the checklists and see any auto-populated answers that may warrant fixes prior to Action Plan submission. HUD reviewers can edit the Action Plan Review Checklists. Comment boxes are provided and some questions are auto-completed. Additionally, some questions may be mandatory and will need to be completed prior to submission.
		Display Changes Comparison	Grantee and HUD users can view a comparison of the current and previous version of an Action Plan.
		View Functions	Grantee users can 'View' Action Plan Submission and Review Comments, Review Checklists, Flags, and Prior Version Changes in the Review Tools link. HUD users can 'View' Action Plan Submission and Review Comments, Review Checklists, Flags, and Prior Version Changes on the Review Action Plan screen.
Edit Action Plan Screen	N/A	Submission Comments	Grantee users can now provide submission comments when they submit their Action Plan. The submission comments will enable grantees to provide a summary of changes in the new or updated Action Plan, and/or convey any other information they deem relevant to the HUD reviewer.
N/A	Review Action Plan Screen	Review Comments	HUD reviewers can provide review comments on Action Plans and activities to communicate information to grantees or request specific edits to the Action Plan prior to approving or rejecting the Action Plan.
		Supporting Documents	HUD reviewers can attach supporting documents to the Action Plan Review to supplement documentation or share information.
		Action Plan Status	HUD reviewers update the status of an Action Plan from the "Review Action Plan screen" (no change in Release 7.13).

This Fact Sheet covers all Action Plan Review components listed above except Flags, which are covered in a separate Fact Sheet.

Accessing Grantee Review Tools

DRGR includes a “REVIEW TOOLS” link that is home to many of the functions described in this Fact Sheet. These tools are provided to grantees to aid in performing QA/QC prior to Action Plan submission. The “REVIEW TOOLS” link is located on the Edit Action Plan. To reach the “REVIEW TOOLS” link:

- Begin in the Action Plan module.
- Click on the link in the Action Plan Status column to reach the Edit Action Plan Screen.
- Once the new screen loads, the “REVIEW TOOLS” link is available on the left menu.

Home	Admin	Action Plans	Drawdown	QPR	Reports	Grants
Action Plans						
View All Action Plans						Help?
1 Page 2 >						
State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR	
NJ	New Jersey	B-98-DD-34-0001	Close	Submitted - Await for Review	Review QPRs	
NJ	New Jersey	B-08-DN-34-0001	Active	Modified - Resubmit When Ready	Review QPRs	
NJ	Bergen County, NJ	B-08-UN-34-0101	Active	Modified - Resubmit When Ready	Review QPRs	
NJ	Jersey City, NJ	B-08-MN-34-0101	Active	Modified - Resubmit When Ready	Review QPRs	
NJ	Newark, NJ	B-08-MN-34-0102	Active	Reviewed and Approved	Review QPRs	
NJ	Paterson, NJ	B-08-MN-34-0103	Active	Reviewed and Approved	Review QPRs	
NJ	Union County, NJ	B-08-UN-34-0102	Active	Submitted - Await for Review	Review QPRs	
NJ	Newark, NJ	B-09-CN-NJ-0009	Active	Reviewed and Approved	Review QPRs	
NJ	Housing Authority of Camden City	B-09-CN-NJ-0010	Active	Reviewed and Approved	Review QPRs	
NJ	Camden Redevelopment Agency	B-09-CN-NJ-0008	Active	Modified - Resubmit When Ready	Review QPRs	

Login ID:T027GA
Roles:Grantee Admin

Action Plan

- [View All](#)
- [Lookup Consolidated Plans](#)
- [View Action Plan](#)
- [Download Action Plan](#)
- [Review Tools](#)

Projects

- [Add Project](#)
- [Search/Edit Project](#)
- [Upload Project](#)

Responsible Organization

- [Add](#)
- [Search](#)
- [Upload](#)

Utilities

- [Print Page](#)
- [Profile](#)
- [Subscriptions](#)
- [Help](#)
- [FAQ](#)
- [Logout](#)
- [Reports](#)

Links

- [CPD Systems Login](#)
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Home	Admin	Action Plans	Drawdown	QPR	Reports	Grants																	
Action Plans																							
Edit Action Plan						Help?																	
<p>Grant Number: B-08-DN-34-0001</p> <p>LOCCS Authorized Amount: \$51,470,620.00</p> <p align="right"> Funding Sources Areas of Greatest Need Distribution and Uses of Funds Definitions and Descriptions Low Income Targeting Acquisition and Relocation Public Comment </p> <p align="center"><input type="button" value="Upload Action Plan"/></p> <p align="center"> <input type="button" value="Add Activity"/> <input type="button" value="Save"/> <input type="button" value="Submit Action Plan"/> <input type="button" value="Cancel Edit Action Plan"/> </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>LOCCS Authorized Amount:</td> <td align="right">\$51,470,620.00</td> </tr> <tr> <td>Grant Award Amount:</td> <td align="right">\$51,470,620.00</td> </tr> <tr> <td>Estimated PI/RL Funds:</td> <td align="right">\$1,242,779.93</td> </tr> <tr> <td>Total Budget:</td> <td align="right">\$52,713,399.93</td> </tr> </table> <p>Note: Click <input checked="" type="checkbox"/> to drill down activities.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Project #</th> <th>Project Title</th> <th>Project Budget</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> 1</td> <td>NSP Rehabilitation</td> <td align="right">\$21,815,709.70</td> </tr> <tr> <td><input checked="" type="checkbox"/> 2</td> <td>NSP Acquisition</td> <td align="right">\$13,361,192.25</td> </tr> </tbody> </table>							LOCCS Authorized Amount:	\$51,470,620.00	Grant Award Amount:	\$51,470,620.00	Estimated PI/RL Funds:	\$1,242,779.93	Total Budget:	\$52,713,399.93	Project #	Project Title	Project Budget	<input checked="" type="checkbox"/> 1	NSP Rehabilitation	\$21,815,709.70	<input checked="" type="checkbox"/> 2	NSP Acquisition	\$13,361,192.25
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Clicking on the “REVIEW TOOLS” link reveals the information listed below and shown in the following screen shot:

- Grant Submission Comments
- HUD Review Comments
- HUD Review Supporting Documents
- Display Changes Link
- Review Checklist Link
- List of Active Flags

Review Tools
Grant Number: B-98-DD-34-0001
Grantee Name: New Jersey
Grantee Submission Comments: None
HUD Review Comments: None
HUD Review Supporting Documents: None
Display Changes Display changes from prior approved review
Review Checklist Review Checklist
Flags
Active Action Plan Flags: None
Active Project and Activity Flags: None

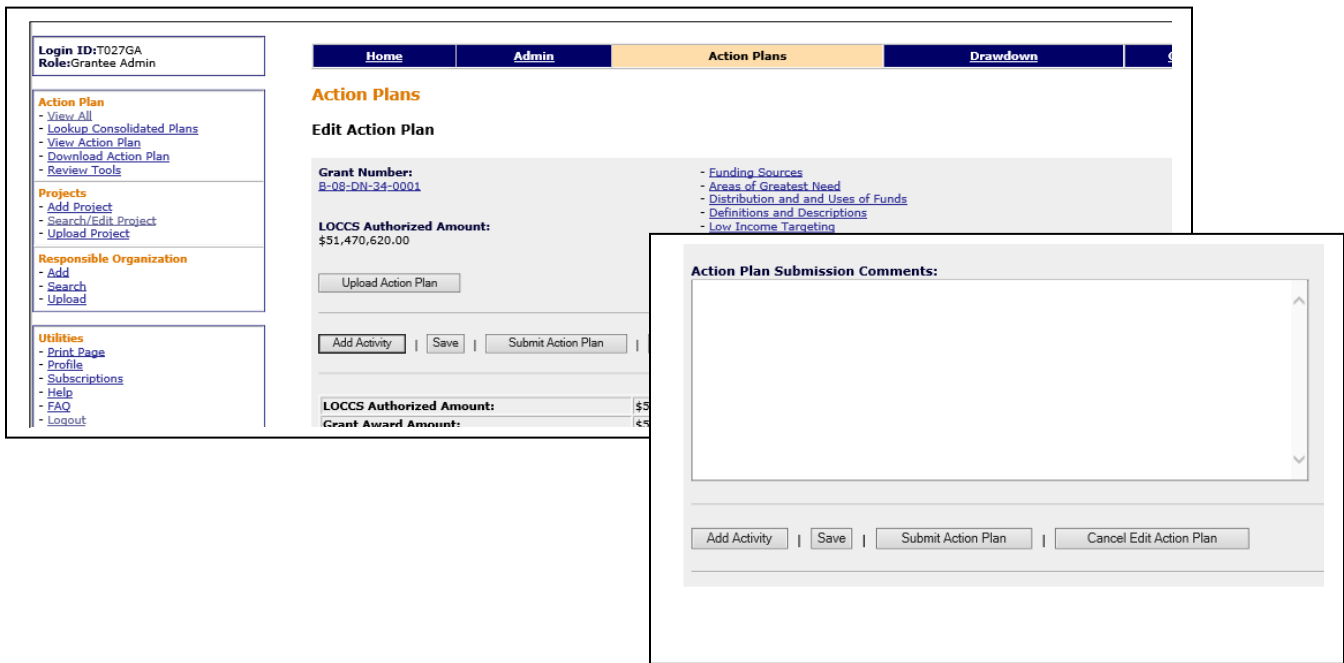
Note: HUD users can also access Review Tools prior to Action Plan submission on the HUD review screens.

Each of these review features is described in more detail below.

Grantee Submission Comments

Grantee users can now enter submission comments prior to submitting their Action Plan to HUD. This enables a grantee to communicate important information to its CPD Representative directly through DRGR. The Submission Comments text box is located at the bottom of the Edit Action Plan screen as shown in the screen shot below.

Once entered, the Grantee Submission Comments appear on the Review Tools display for both HUD users and grantee users.



New HUD Review Screen

The HUD review screen has been redesigned to feature the new Review Tools. No changes have been made to the process for accessing the Review Screen. HUD users are still able to access the View Action Plan screen and a PDF version of the Action Plan to aid in their review. The new HUD review screen includes:

- **Change Action Plan status (unchanged).** The status of the Action Plan is changed by choosing a new status from the dropdown menu.
- **Display Changes.** Compare changes to prior approved Action Plan
- **Enter Review Comments.** The comments field is a narrative text box.
- **Attach Supporting Documents.** Supporting documents are added by clicking the “ADD ADDITIONAL DOCUMENTS” link. Documents that are added can also be removed.
- **Edit Review Checklist.** View auto-populated answers and complete applicable questions.
- **Provide comments on Activities and Flags.** Activity-level detail and Flags are accessed by scrolling further down on the Review QPR screen and choosing to search for activities or flags. For more information on Flags, see the Flags Fact Sheet.

Note that HUD users must be assigned to the grant and the Action Plan must be in Submitted- Await for Review status in order to use these features.

Action Plan Review Checklist (HUD and Grantee users)






As noted above, by clicking on the “REVIEW TOOLS” link in the left-hand menu of either the Edit Action Plan screen for grantee users or the Review Action Plan screen for HUD users, the user sees a link for “REVIEW CHECKLIST.” See Screen shot below.




After clicking on the “REVIEW CHECKLIST” link, a new screen opens and the user sees all checklist items. Grantee users can use this function to view the checklist. HUD users can use this function to manage the checklist. Checklist features allow them to complete questions and add comments to ensure their reviews are complete and well-documented. The checklists in Release 7.13 contain some mandatory questions and some questions are auto-completed by the system. Icons have been added to indicate these categories. The screen shot below shows the checklist and a legend of icons.

Review Checklist (Action Plan):





Grant Number: B-08-UN-34-0102

LEGEND:

-  Warning
-  Pre-calculated
-  Manual Input
-  View Supporting Data
-  Mandatory

Status	Seq	Question Text/Answer/Comments
Section: Areas of Greatest Need		
	1	<p> Does the submission identify a neighborhood or neighborhoods as being areas of greatest need with an individual or average combined index score for the grantees identified target geography that is not less than</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p><input type="checkbox"/> Verification on Page</p> <p>Comments <input type="text"/></p>
Section: Distribution and Use of Funds		
		<p> Does the submission contain a narrative describing how the distribution and uses of the grantees NSP3 funds will meet the requirements of Section 2301(c) (2) of HERA, that funds be distributed to the areas of</p>

The Action Plan Review checklist enhancements include:

1. Mandatory questions are annotated on the edit checklist page with the following icon: (*). Review checklists cannot be submitted if the user has not entered mandatory questions.
2. Questions that are mandatory and do not have a response will be displayed with a warning icon as follows: ().
3. Some question responses may be auto-computed by the system and are depicted with the following icon: (). If a response to a checklist question is auto-computed, then the system displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
4. Non-auto-computed question responses are depicted with the following icon: ().
5. Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. Auto-computed responses with supporting data will be annotated with the following icon: (). On selection of this icon, the system will open a new window to display the supporting data.
6. Grantee and HUD users can view and download a PDF version of the Action Plan Review Checklist.

Display Changes (HUD and Grantee Users)

As noted above, by clicking on the “REVIEW TOOLS” link in the left-hand menu of the Edit Action Plan screen for grantee users or the Review Action Plan screen for HUD users, the user sees a link to “DISPLAY CHANGES FROM PRIOR APPROVED REVIEW.”

By clicking on the “DISPLAY CHANGES FROM PRIOR APPROVED REVIEW” link, a new window opens and the user sees a side-by-side comparison of the Action Plan comparing the current version of the Action Plan to the previously submitted Action Plan.

As shown below, the top of the screen will provide a total of all differences in the comparison and the individual changes will be highlighted in the rows that follow. For example, in the screen shot below, a change to the estimated Program Income (PI) was made to change the amount from \$1,242,779.93 to \$1,241,779.93.

Current		Prior	
- 1	Action Plan	1	Action Plan
2		2	
3	Grantee: New Jersey	3	Grantee: New Jersey
4		4	
5	Grant: B-08-DN-34-0001	5	Grant: B-08-DN-34-0001
6	Grant Award Amount: 51,470,620.00	6	Grant Award Amount: 51,470,620.00
7	LOCCS Grant Amount: 51,470,620.00	7	LOCCS Grant Amount: 51,470,620.00
8	Estimated PI: 1,242,779.93	8	Estimated PI: 1,241,779.93
- 9	Total Budget: 52,712,399.93	9	Total Budget: 52,712,399.93
10		10	