

DRGR FACT SHEET: Subordinate Grantees

Before DRGR Release 7.7 in October 2013, DRGR user profiles could be requested by grantee users for subordinate grantees but DRGR did not allow restricted access to appropriate activities. As of Release 7.7, DRGR allows grantee administrative users to authorize restricted access to users from subordinate grantees identified using the responsible organization screen at the primary grantee level.

Primary Grantee Admin users can specify allowable roles:

- Edit Action Plan (AP) activity under Responsible Organizations,
- Submit Voucher request under Responsible Organizations,
- Submit Quarterly Performance Report (QPR) activity profile under Responsible Organizations.

Grantee users can associate a Responsible Organization (RO) to a DRGR Grantee using the Add/Edit RO page. This allows all users of associated grantee to have access to activities where the RO is last as the primary RO. These new functions allow Grantee Admin users to extend limited access to users in these subordinate grantees if they so desire.

Based on the role the subordinate grantees are only allowed following actions for the activities where they are primary responsible organizations:

1. Edit Activity profiles in the Action Plan
2. Edit Activity profiles in QPR
3. Create/Modify Receipts
4. Create Vouchers
5. Revise Vouchers

As part of these new functions, subordinate grantees also have access to voucher and QPR upload functions in the drawdown and QPR modules for their activities. Subordinate grantees cannot submit the entire Action Plan to HUD or edit activities outside their profile. They cannot modify Estimated PI on the Action Plan or update obligations, create PI accounts, or approve Vouchers in the drawdown module. They cannot submit the QPR to HUD.

Any grantee users can use the Add/Edit Responsible Organization page under the Action Plan module to designate whether the organization is another DRGR grantee. This is done through a drop-down in the bottom right of the screen. Once this association is made, DRGR will then be able to display all the available users from a subordinate grantee under screens that grantee administrators for the PRIMARY grantee can see and edit. Once the Responsible Organization is linked and the subordinate grantee users are assigned roles, they will be able to make edits only on the activities tied to the responsible organization under which they are assigned. They can view information for other activities, but will not be able to edit them.

Edit Organization

[Save](#) | [Cancel](#)

* Indicates required field

| | | |
|--|---|--|
| Profile *Organization Name: Housing Finance Authority of Pinellas County *Organization Type: Non-Profit *DUNS #: 785477436 Ext: *EIN/TIN #: 592286929 Address Line 1: 600 Cleveland Street Address Line 2: Suite 800 Address Line 3: (see Division of Housing) *City: Tampa *State/Territory: FL Zip Code: | Contact Information First Name: Anthony Middle Initial: Last Name: Jones Title: Executive Director Email: srekhi@caci.com Address: 600 cleveland street, Suite 800 City: Clearwater State: FL Zip Code: Telephone: 7274648210 Ext: | Associated Grantee Grantee: Pinellas County, FL |
|--|---|--|

Existing DRGR Function

In order to see and authorize grantee users from a subordinate grantee to access information on activities, the primary grantee must first have made the required links using the Add/Edit Responsible Organization page to associate the Responsible Organization with another DRGR grantee. This allows DRGR to access the list of users for the subordinate grantee and also lets DRGR know which activities should be editable based on the rights assigned by the PRIMARY GRANTEE admin user.

The screenshot shows the Admin interface with a navigation bar (Admin, Action Plans, Drawdown, QPR, Reports) and a sidebar with various menu items. The main content area is titled 'Subordinate Grantee User Access' and contains two columns of user lists. The 'Assign Role' section at the bottom is highlighted with a red box, showing a dropdown menu and checkboxes for 'All', 'Draw Request', 'Edit AP', and 'Edit QPR'. The 'All' checkbox is checked.

Grantee admin users may assign one or more roles: 1) Draw Request (and Revise Draw); 2) Edit AP Activity Profile, and/or 3) Edit QPR activity profile. Subordinate users can SEE all activities, but can only edit based on the activities assigned to the responsible organization using the GRANTEE dropdown and the rights listed. Any user can see what subordinate profiles have been established by using the VIEW SUBORDINATE GRANTEE link in the ADMIN module.

Login ID:T030GA
Role:Grantee Admin

Admin
[Associate User to Grants](#)
[Certify Grantee Users](#)
[View Subordinate Grantees](#)
[Edit Subordinate Grantees](#)

Monitoring/Audit/TA
[Add Monitoring/Audit/TA](#)
[View All Monitoring/Audit/TA](#)
[Search Monitoring/Audit/TA](#)
[Search Event Topics](#)

Admin

View Subordinate Grantee User Access [Help?](#)

| Subordinate Grantee | Login | Name | Draw Request | Edit AP | Edit QPR | Status |
|---------------------|--------|-------------|-------------------------------------|--------------------------|-------------------------------------|--------|
| Pinellas County, FL | T030GR | John Smith | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Active |
| Pinellas County, FL | T031FA | Becky Ramos | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Active |
| Pinellas County, FL | T029GA | Jane Doe | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Active |

Once the new account is activated, the associated grantee users can login based on their profile. In this case the user has two profiles – primary grantee and a subordinate grantee.

Login ID:T029GA
Role:Subordinate Grantee

Utilities
[Print Page](#)
[Profile](#)
[Help](#)
[Logout](#)
[Reports](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Login

Profile Selection

Grantee Profile:

- State of Florida**
Subordinate Grantee Drawdown Request User / Subordinate Grantee QPR Manager
- Pinellas County, FL**
Grantee User / Drawdown Request User

Select Profile

The table below shows the edit privileges for subordinate grantee users based on roles:

| SUBORDINATE GRANTEE ROLES ASSIGNED BY PRIMARY GRANTEE ADMIN USER | Privileges by Assigned Roles | | |
|--|------------------------------|----------------|-----|
| | Action Plan | Create Voucher | QPR |
| Certify regular grantee users | | | |
| Assign grantee users to grants | | | |
| View Monitoring/Audit/TA Events & Topics | | | |
| Enter and View Monitoring/Audit/TA Events & Topics | | | |
| Add/Edit Project | | | |
| Add/Edit Activities in Action Plan (with Sub Grantee as Resp Org only) | X | | |
| Add/Edit Responsible Organizations (for Carryout Budgets/Expenditures) | X | | |
| View Action Plans | X | X | X |
| Edit/Submit Action Plans | | | |
| Update Obligations | | | |
| Create PF & PI Draws | | X | |
| Approve PF & PI Draws | | | |
| Block Activities from Draws | | | |
| Create/Edit PI Accounts | | | |
| Create/Edit PI Receipts | | X | |
| View Vouchers & Receipts | | X | |
| Add/Edit Activities in QPR (with Sub Grantee as Resp Org only) | | | X |
| View QPRs | X | X | X |
| Edit/Submit QPRs | | | |
| View Reports | X | X | X |