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

4. Create Vouchers

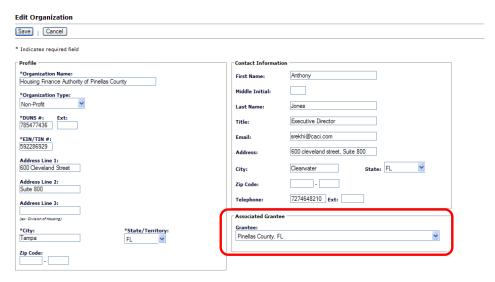
2. Edit Activity profiles in QPR

5. Revise Vouchers

3. Create/Modify Receipts

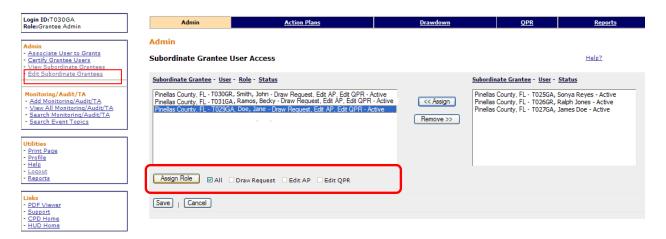
As part of these new functions, subordinate grantees also have access to voucher and QPR upload functions in the drawdown and QPR modules for their activities. Subordinate grantees cannot submit the entire Action Plan to HUD or edit activities outside their profile. They cannot modify Estimated PI on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



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.



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.



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.



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

SUBORDINATE GRANTEE ROLES		Privileges by Assigned Roles		
ASSIGNED BY PRIMARY GRANTEE ADMIN USER	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)	Х			
Add/Edit Responsible Organizations (for Carryout Budgets/Expenditures)	Х			
View Action Plans	Х	Х	Х	
Edit/Submit Action Plans				
Update Obligations				
Create PF & PI Draws		Х		
Approve PF & PI Draws				
Block Activities from Draws				
Create/Edit PI Accounts				
Create/Edit PI Receipts		Х		
View Vouchers & Receipts		Х		
Add/Edit Activities in QPR (with Sub Grantee as Resp Org only)			Х	
View QPRs	Х	Х	Х	
Edit/Submit QPRs				
View Reports	Х	Х	Х	