LaborCategoryAddEdit Upload Instructions

Overview

The DRGR System allows HUD Users and TA Providers Users with the Staff Rate role to manage the TA Provider's Labor Categories and Rates via a data upload. Download the "Labor Category and Rate Add/Edit/Deactivate" upload template and use these instructions to complete the data file. After completing the file, the instructions to upload the file into DRGR are contained in Chapter 34 of the DRGR User Manual upload. The DRGR upload function is available under the "Upload Staff Data" menu option under the Administration module. The upload option is also available as a Power Upload and in the "STAFF" family of uploads.

NOTE
Use the separate upload instructions and data upload, to associate personnel and personnel email addresses to the labor categories and rates. Both the labor category and rate upload and the personnel upload are required steps to comply with HUD standards.

Procedures for Uploading Data into DRGR

1. Download the "Labor Category and Rate Add/Edit/Deactivate" upload template. Use the instructions in this document to complete the upload template. Template should be saved as a .csv file type.
2. When the upload template is complete, log in to DRGR as a user with either:
   2.1. Staff Rate privileges for the TA Provider.
   2.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
3. In DRGR, select to the Administration menu and click on the "Upload Staff Data" option.
4. Select "LaborCategoryAddEdit" from the "Select Upload Type" field.
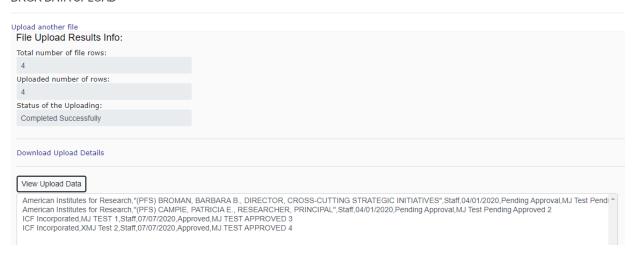
Figure 1-Staff Rate Data Upload Type

5. Select "Choose a File" button. This opens a pop-up window.
6. In the popup window, browse for the .csv upload template and open it. This closes the popup window and the selected file name appears in DRGR.
7. Click on the "Upload" button to start the upload.
8. DRGR will display the screen in Figure 2 below. If any records are unsuccessful, use the "Download Upload Details" link to view the errors. The errors must be corrected in the .csv file. Select "Upload Another File" to upload the corrected data.

Figure 2-Data Upload Results

Upload Template: Data Types
- Date values must be in the format mm/dd/yyyy, for example: 01/01/2021.
- Rate values must be in the format 0.00. If more than two decimal places are provided, the data will be truncated (NOT rounded). For example, 1.125 will become 1.12.

Upload Template: Validations
1. LaborCategoryAction must be provided.
2. TA Provider must be provided and must be exact match of the TA Provider name in DRGR.
3. Verify all field names are included.

Additional Validations for the AddLaborCateogry action
1. Logged-in user must have:
   1.1. Staff Rate privileges for the TA Provider.
   1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. An allowable value for all required fields (see Data Element Matrix table) is provided. Also note the fields that require an entry in the upload (see Required Field Matrix table).
3. A unique value for LaborCategoryTitleNew must be provided.

4. If adding new rates for HUD approval, the Labor Category Status must be set to "Active."

Additional Validations for the EditLaborCategory action

1. Logged-in user must have:
   1.1. Staff Rate privileges for the TA Provider.
   1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. An allowable value for all required fields (see Data Element Matrix table) is provided. Also note the fields that require an entry in the upload (see Required Field Matrix table).
3. When specified, an allowable value for Rate Type must be provided.
4. When specified, an allowable value for OccupationType must be provided.
5. When specified, an allowable value for LaborCategoryStatus must be provided.

NOTE
Within the data upload, add/edit a Labor Category using one row. And add/edit a rate using a different row. And different row to associate/deassociate a person to a labor category.

Additional Validations for the AddRate action

1. Logged-in user must have:
   1.1. Staff Rate privileges for the TA Provider.
   1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. An allowable value for all required fields (see Data Element Matrix table) is provided. Also note the fields that require an entry in the upload (see Required Field Matrix table).
3. The value provided for LaborCategoryTitleCurrent must match an existing labor category.
4. BaseRateNew must be **greater than** $0.
5. OverheadRateNew greater than or equal to $0.
6. GeneralAdminRateNew must be **greater than or equal** to $0.
7. FringeRateNew must be **equal to or greater than** $0.
8. TotalRateNew must be **greater than** $0.
9. RateStatus value must be set to "Pending Approval" to submit the rate to HUD for approval. Set to "Inactive" to submit the rate manually in DRGR or at a later time.
10. A duplicate rate cannot be added to the system. A rate is uniquely defined by labor category + rate type + effective date + total rate.

Additional Validations for the EditRate action

1. Logged-in user must have:
   1.1. Staff Rate privileges for the TA Provider.
   1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. An allowable value for all required fields (see Data Element Matrix table) is provided. Also note the fields that require an entry in the upload (see Required Field Matrix table).
3. The values provided for the required fields must match an existing labor category rate.
4. When specified, BaseRateNew must be **greater than** $0.
5. When specified, OverheadRateNew **greater than or equal to** $0.
6. When specified, GeneralAdminRateNew must be **greater than or equal to** $0.
7. When specified, FringeRateNew must be **greater than or equal to** $0.

8. When specified, TotalRateNew must be **greater than** $0.
9. The edits to the rate should not result in the creation of a duplicate rate.

NOTE
Rate Status updates are permitted. To learn which rate status transitions are allowable, please see the allowable rate status transitions table.

Additional Validations for the AssociatePersonnel action

1. Logged-in user must have:
    1.1. Staff Rate privileges for the TA Provider.
    1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. LaborCategoryTitle_Current must be provided.
3. The value specified for LaborCategoryTitle_Current must match a Labor Category for the TA Provider.
4. PersonnelEmailAddress must be provided.
5. A record with the value provided for PersonnelEmailAddress must appear in the TA Provider's list of personnel.

Additional Validations for the DesassociatePersonnel action

1. Logged-in user must have:
    1.1. Staff Rate privileges for the TA Provider.
    1.2. HUD User who is a member of the HUD Staff Rate Approval Group for the grant.
2. LaborCategoryTitle_Current must be provided and must match a Labor Category for the TA Provider in DRGR.
3. PersonnelEmailAddress must be provided.
4. An association between the specified Labor Category Title and the specified personnel must exist for the TA Provider.
5. The Labor Category Title and the specified personnel must **NOT** be specified for a Work Plan.

Data Element Matrix

Use these entries to complete the noted fields in the data upload template.

Labor Category Actions Allowed:
- Use the "AddLaborCategory" action to add a labor category in to DRGR.
- Use the "EditLaborCategory" action to edit information for a labor category already in to DRGR.
- Use the "AddRate" action to add a rate to a labor category in to DRGR.
- Use the "EditRate" action to edit a rate to a labor category in to DRGR.
- Use the "AssociatePersonnel" to associate a person already in DRGR to a labor category.
- Use the "DeassociatePersonnel" to disassociate a person from a labor category.

Table 1-Data Element Matrix

Data Elements Allowed for Fields Named				
LaborCategoryAction	**RateType**	**OccupationType**	**LaborCategoryStatus**	**RateStatus**
AddLaborCateogry	TBD	TA~TBD	Active	Inactive
EditLaborCategory	Staff	TA~Accountant	Inactive	Pending Approval
AddRate	Consultant	TA~Accounts Payable Manager		Approved
EditRate	Contractor	TA~Financial Analyst		Rejected
AssociatePersonnel	Subrecipient	TA~Financial Manager		
DesassociatePersonnel		TA~Program Manager		
		TA~Project Manager		
		TA~Communications Specialist		
		TA~Marketing Specialist		
		TA~Marketing Manager		
		TA~Administrative Specialist I		
		TA~Administrative Specialist II		
		TA~Administrative Specialist III		
		TA~Administrative Manager		
		TA~Attorney		
		TA~Paralegal		
		TA~Auditor		

		TA~Loan Specialist	
		TA~Underwriter	
		TA~Civil Engineer	
		TA~Construction Specialist	
		TA~Construction Engineer	
		TA~Economist	
		TA~Energy Engineer	
		TA~Energy Specialist	
		TA~Structural Engineer	
		TA~Environmental Engineer	
		TA~Environmental Specialist	
		TA~Architect	
		TA~Geologist	
		TA~Real Estate Specialist	
		TA~Urban/Regional Planner	
		TA~Housing Specialist	
		TA~Business Analyst I	
		TA~Business Analyst II	
		TA~Business Analyst III	
		TA~Data Analyst	
		TA~Editor/Writer	
		TA~eLearning Specialist	
		TA~Information Technology Specialist	
		TA~Web Development Specialist	
		TA~Graphic Design Specialist	
		TA~Research Specialist	
		TA~Training and Evaluation Specialist	
		TA~Instructor	
		TA~Videographer	

Required Field Matrix

Table 2-Required Field Matrix

Field Names	Labor Category Actions					
	AddLaborCateogry	EditLaborCategory	AddRate	EditRate	AssociatePersonnel	DesassociatePersonnel
LaborCategoryAction	REQ	REQ	REQ	REQ	REQ	REQ
TAProvider	REQ	REQ	REQ	REQ	REQ	REQ
LaborCategoryTitleCurrent	—	REQ	REQ	REQ	REQ	REQ
LaborCategoryTitleNew	REQ	OPT	—	—	—	—
RateType	REQ	OPT	—	—	—	—
OccupationType	REQ	OPT	—	—	—	—
LaborCategoryStatus	REQ	OPT	—	—	—	—
RateEffectiveStartDateCurrent	—	—	—	REQ	—	—
BaseRateCurrent	—	—	—	REQ	—	—
OverheadRateCurrent	—	—	—	REQ	—	—
GeneralAdminRateCurrent	—	—	—	REQ	—	—
FringeRateCurrent	—	—	—	REQ	—	—
TotalRate_Current	—	—	—	REQ	—	—
RateEffectiveStartDateNew	—	—	REQ	OPT	—	—
BaseRateNew	—	—	REQ	OPT	—	—
OverheadRateNew	—	—	REQ	OPT	—	—
GeneralAdminRateNew	—	—	REQ	OPT	—	—
FringeRateNew	—	—	REQ	OPT	—	—
TotalRateNew	—	—	REQ	OPT	—	—
RateStatus	—	—	REQ	OPT	—	—
PersonnelEmailAddress	—	—	—	—	REQ	REQ
RateComment	—	—	—	REQ	—	—

NOTE: REQ indicates that the field is required field. OPT indicates that the field is optional. A dash symbol (—) indicates that the field should be blank for the specified action; these will be ignored by the system.

Allowable Rate Transactions

Grantee Users

Table 3-Allowable Rates Actions for Grantee Users

		TO			
		Inactive	**Pending Approval**	**Rejected**	**Approved**
FROM	Inactive	Yes	Yes	No	No
	Pending Approval	No	No	No	No
	Rejected	Yes	Yes	Yes	No
	Approved	Yes	Yes	No	No

HUD Users

Table 4-Allowable Rates Actions for HUD Users

		TO			
		Inactive	**Pending Approval**	**Rejected**	**Approved**
FROM	Inactive	Yes	Yes	Yes	Yes
	Pending Approval	No	No	Yes	Yes
	Rejected	Yes	Yes	Yes	Yes
	Approved	Yes	Yes	Yes	Yes