

Chapter 16: Action Plan Submission and Approval | Manage My Grants Module

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Chapter 16: Action Plan Submission and Approval | Manage My Grants Module

This Chapter provides instruction for Grantee Users to submit Action Plans for HUD approval, using the **Manage My Grants** module. This Chapter explains the process HUD Users will use to review the Action Plan. These functions are not currently applicable to Grantee Users associated with a technical assistance provider in DRGR and HUD TA Users overseeing TA awards.

This Chapter describes actions for Grantee Users and HUD Users and is divided into subsections. The following actions are covered in this Chapter:

Grantee Users

Menu Option	Subsection	Action
🕼 Manage Action Plan	B4	Submit Action Plan for review

HUD Users

Menu Option	Subsection	Action
Review Action Plan	C1	Review Action Plan

A. Manage My Grants Module Access

The Manage My Grants module contains access to Action Plan actions.

A1. Grantee | User Access

User I	Role: Grantee User		Menu Option: 💼 Manage My Grants Module	
Purpo	ose: Allow Grantee Users to ac	cess Action Plan	n actions.	
	Complete the following steps t	o access the Ma	anage My Grants Module:	
1 In na	the DRGR System, select the N avigation menu.	Aanage My Gran	nts module, or 💼 icon, located in the	
ę		B-11-DN-13-0001	🔒 🕅 🏠 🏎 🗧 🤷 🏎 🚱 🖌 🏰 - 💄 Misner, Glen	
2 Tł	nis opens the dropdown men	u items for the	e Manage My Grants module. The DRGR System	

2 This opens the dropdown menu items for the **Manage My Grants** module. The DRGR System displays the relevant menu items based on user type and user roles. Functions available are displayed under each menu.



ACTION PLANS		PROJECTS		ACTIVITIES		GRANTEE PROGRAMS	
Manage Action Plan		Add Project		Add Activity		Add Grantee Program	
 View Action Plan 		Q Search Projects	۲	Q Search Activities	٠	Q Search Grantee Programs	¢
🛓 Download Action Plan				Restore Activities	۲		
Q Search Action Plans	۲						
🗙 Review Tools							
Q Lookup Consolidated Plans	۲						

A2. HUD | User Access

Us	er Role: HUD User				Menu Option:	<u>т</u> М	anage My Grants I	Module
Pu	rpose: Allow HUD U	sers to a	access Action F	Plan acti	ons.			
র্ষ	Complete the foll	owing s	teps to access	the Ma	nage My Grants N	lodule	::	
1	In the DRGR System navigation menu.	n, click t	he Manage M y	y Grants	module, or 🏦	icor	n, located in the	
			B-11-DN-13-000	01		- \$- (∰- €- ⊻- ≗ - ^{Misne} 1017/	r, Glen 5AJ
2	This opens the dro displays the releva displayed under eac	pdown nt men ch menu	menu items f u items based J.	for the d on us	Manage My Gran er type and user	ts mo roles.	odule. The DRGR S Functions availab	System ble are
	🟛 Manage My Gr	ants						
	ACTION PLANS	PF	ROJECTS		ACTIVITIES		GRANTEE PROGRAMS	
	Manage Action Plan	C	Add Project		Q Search Activities	۲	Q Search Grantee Programs	•
	 View Action Plan 	Q	Search Projects	•				
	🛓 Download Action Plan							
	Review Action Plan	ala a						
	C Search Action Plans	W						
	Q Lookup Consolidated Plans	⊕						

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B. Action Plan Submissions

B1. Action Plan Status

The DRGR Action Plan is fluid and is expected to change often. Nearly all Grantees will, at some point, need to revisit the information in the action plan and make changes. (Reminder: Action Plans for Grants associated with technical assistance provider organizations are established by HUD and do not require Grantee modifications.) It is important to understand that those changes, even if minor, will require resubmission of the action plan to HUD for review and approval. If a Grantee is making several changes to their action plan, they may wait until all of the changes are made and submit the action plan at once (instead of incrementally) to their HUD CPD Representative for review.

The figure below illustrates the flow of an action plan between a Grantee and HUD and the statuses the action plan will move between throughout the process. Action Plans start in 'Original – In Progress' status when they are added to the DRGR System. They will stay in this status until submitted when the status changes to 'Submitted – Await for Review.' At this point, HUD CPD Representatives will review the action plan and either approve the plan or reject the plan. If rejected, the action plan will be in a status of 'Rejected – Await for Modification' and will be available for Grantee edits. Once edited, status will change to 'Modified – Resubmit when Ready' until the plan is resubmitted by the Grantee. Once approved, an action plan will show a status of 'Reviewed and Approved.' Note that the action plan must be in 'Reviewed and Approved' status in order to submit the Performance Report. See Chapters 19 - 22 on Performance Reports for more information.



B2. Review Tools

Prior to submitting the Action Plan to HUD, Grantees are encouraged to use the Action Plan Review Tools to ensure a quality and compliant submission. Action Plan Review Tools allow a Grantee to check compliance with required elements of the action plan and review the plan's content for accuracy and completeness and are the same tools that the Grantee's HUD CPD Representative will use in conducting the Action Plan review. Using the tools in advance of the Action Plan submission can make for an easier and faster HUD review. The Review Tools allow Grantees and HUD to review compliance elements in the Action Plan checklist, display changes to the current version of the action plan as compared to the version approved previously, resolve, remediate, or comment on flags, and attach supporting documents. See Chapter 14 – Action Plan Review Tools for more information on how to use these helpful features.



B3. Troubleshooting

It is important to note applicable DRGR rules when attempting to submit an Action Plan for HUD review. If a user is unable to edit and/or submit the Action Plan, then it is likely because of one of the following common situations:

- An Action Plan cannot be submitted unless the Grantee User has the 'Submit Action Plan' role. Only users with the 'Submit Action Plan' role can submit action plans. Grantee Users can, however, edit Action Plans, even without the 'Submit Action Plan' role. See Chapter 5 – User Management and Certification for instructions on adding additional user roles.
- An Action Plan in a status of 'Submitted Await for Modification' cannot be modified. If a Grantee user has submitted the Action Plan, it cannot be edited until a HUD user has either rejected or approved the action plan. To resolve this issue, contact your HUD CPD representative.
- An Action Plan for a Grant with a QPR in a status of 'Submitted Await for Modification' cannot be submitted. Performance Reports depend on data from the action plan. Although not recommended, Grantee users can 'edit' an action plan while a performance report is in 'Submitted Await for Modification' status. However, an action plan cannot be 'submitted' until a HUD User that can view the Grant has either rejected or approved the performance report. To resolve this issue, contact your HUD CPD representative.
- If an Action Plan cannot be edited it may be because (1) the Grantee is not active, (2) the Grant is not active, or (3) the user does not have edit capabilities. Grantee DRGR accounts designated as 'View Only' cannot edit action plans or performance reports, however, Regular Grantee Users associated to a Grant can edit the action plan without additional roles. If a Grantee or Grant is not showing as active in DRGR, this may be a mistake by HUD's DRGR System administrators. Contact your Grantee System administrator or <u>DRGR Help@hud.gov</u>.

B4. Grantee | Submit Action Plan

This action allows the Grantee to submit the Action Plan to HUD for review and approval.

User Role: Grantee User	Menu Option: 🕜 Manage Action Plan
Purpose: Allow Grantee Users to submit the DRGR	Action Plan for HUD review.
Complete the following steps to submit a DRC	GR Action Plan:
1 After using the Review Tools outlined in Chapter 14 of the DRGR User Manual, navigate to the Manage My Grant or icon from the main navigation bar and select the <manage action="" plan=""> link under the Action Plan menu. See Section A1 above. The "Manage Action Plan page will load for the Grant selected in the locked of the Grant selected of the Grant selec</manage>	PROGRAM PROCESS RECOMMENDATION: Certain Disaster Recovery Grantees may be required to submit a Public Action Plan <u>and</u> a DRGR Action Plan. See Chapter 11 of the DRGR User Manual for details on the Public Action Plan, including submission steps. Consult your HUD Representative if you are unsure whether a Public Action Plan is required for your program.



Us	er Role: Grantee User	Menu Option: 🕜 Manage Action Plan
	Grant bar. Select <submit plan=""></submit> in the upper rig	ght-hand corner of the page.
	Grant Number: TEST GRANT Grantee Name: Georgia Appropriation Code: 2013 SDY Action Plan Status: Image: Compared and the status: Image: Transition Narratives Documents Measures	Vesco Submit Plan LOCCS Authorized Amount: \$0.00 Grant Award Amount: \$10,000,000,000,000 Total Estimated P//RL Funds: \$0.00 Total Budget: \$10,000,000,000,000 Programs Projects Activities
2	After selecting <submit plan=""></submit> , a page will load Note, it is recommended to include submission modifications and additions for which the Gr comments will assist in HUD's review. Once ent display for both HUD users and Grantee Users. The Action Plan is now submitted and will show	d that allows Grantees to include submission comments. on comments for the HUD CPD Representative regarding rantee is seeking HUD approval in the Action Plan. The cered, submission comments appear on the "Review Tools" After entering the submission comments, select <submit></submit> . v the status of 'Submitted – Await for Review'.
	Submit Action Plan for Review Submission Comments:	★ III ◆ 3 * Glev ← V ← (roldGA) * Back ◆ Submit Plan \$37,943,000.00 \$37,943,000.00 \$390,000.00 C Edit Activities History Upload
	va 37	Cancel Submit Total Drawn Program Funds Drawn Program Income Drawn 43.00 \$5588.113.42 \$5588.113.42 \$0.00
	The remainder of t	his page intentionally left blank.



User	Role: Grantee User		Menu Option:	🗹 Manage A	ction Plan	
3 At a re lir	fter selecting <submit></submit> or "Create Email" page to all eview. This page will displa nks to add additional recip	n the "Submit Action low the Grantee use ay a "Success: Action pients to the email.	n Plan for Review" r to notify the rev n Plan has been s	' page to sub viewer(s) that aved" messag	mit the plan, DR t the Action Plar ge. Select the <	GR will load is ready for To> or <cc></cc>
	Action Plan submitted.					×
	🟛 Manage Action Plan					4 Back
	Grant Number: Grantee Name: Appropriation Code: Action Plan Status:	TEST GRANT Georgia 2013 SDY Submitted - Await for Review	LOCCS Autho Grant Award Total Estimat Total Budget	rized Amount: Amount: ed PI/RL Funds: :	\$0.00 \$10,000,000,000,000.00 \$0.00 \$10,000,000,000,000.00	C2 Edit
	Create Email Success Action Plan has been saved. Toricate beauer Price Vote: Multiple email addresses must be separated by a semi-colon. For Exampl To:	e abc@hudgor iyz@hudgor				
	cc : sunil.rekhi@hud.gov					
	Subject: DRGR Notification[3] - Action Plan for Grant: TEST GRANT Grante Message: DRGR Notification[3] - Action Plan for Grant: TEST GRAN	e: GeorgiaSubmitted for HUD Review T Grantee: GeorgiaSubmitted for HUD Review				
4 Se pa to ea su	electing the <to></to> or <cc></cc> I age. On this page, users of an email for notification ach time an Action Plan is ubscriptions.	inks to add additiona can search for additi of Action Plan subm submitted for reviev	al recipients to the onal recipients to ission, DRGR user v. See Chapter 7 -	e email takes t add to the e s can create a - My Profile f	the user to the " email. In lieu of l a subscription to or information o	Email Search" being added o be notified on managing
	Manage Action Plan					< Back
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	Select Option Last Name: Search Reset	State / rentory: Select Option First Nome:		v v		
(Return to Previous Page					



C. Action Plan Reviews

HUD users must review and approve or reject submitted Action Plans. HUD review will be specific to the Grant appropriation and will focus on the compliance of the Action Plan with Grant requirements and the accuracy and completeness of information. The review will be a means for the HUD CPD Representative to understand how the Grant program is structured.

As part of this review, HUD users will utilize the "Review Tools" feature to access the Action Plan Checklist, display changes to the current version of the Action Plan, provide comments on active activities and flags, enter overall review comments, and attach supporting documents. Grantees should use the Review Tools functions prior to submitting their Action Plans to ensure a smooth and efficient HUD review. Below is an illustration of how Grantee users and HUD users will use Review Tools to ensure compliance and quality. See Chapter 14 – Action Plan Review Tools for detailed information on using these functions.



C1. HUD | Review, Approve, and Reject Action Plan

This section explains the steps a HUD user will take to review an Action Plan submitted by a Grantee. Note that there is a difference between HUD's use of the "Review Screen" and the "Review Tools." The **"Action Plan Review"** page is where HUD users review and approve or reject the Action Plan and enter review comments. In contrast, "Review Tools" provide a summary of all Grantee and HUD user review actions.

User Role: HUD User	Menu Option: Review Action Plan					
Purpose: Allow HUD Users to review and approve or reject the DRGR Action Plan.						
Complete the following steps to review and approve or reject a DRGR Action Plan:						



User Role: HUD User				Menu Option: Review Action Plan 					
1	After using Re Grant or in Plan menu. So "Submitted – a select the pene	view Tools outlined con from the main n ee Section A2 above Await for Review" to cil icon in the "Actior	in Cha avigatio e. On t o searc ns" colu	pter 14 o on bar an he "Searc h for Acti umn to loa	f the DRGR U d select the <f< b=""> h Action Plan on Plans in su ad the "Reviev</f<>	ser Man Review A s″ page, ıbmitted v Action	ual, navigate to ction Plan> link select the Action status. From th Plan" page.	the Manage under the Ac on Plan Statu ne search res	e My ction us as sults,
	CPD Disaster Recovery Grant	Reporting System			Louisiana X-22-PA-02-0224		🔒 😤 重- \$- 진	ē• €• ₩• ≗• [TOO1SU]	st, T001SUFirst
	Q Search Actio	on Plans							Back
	Search Criteria 👻								
	HUD Office:	Select Option		~	State/Territory:	Select Option		~	
	Grantee Name:	Louisiana			Program Name:	Enter Program	Name		
	Appropriation Code:	Enter Appropriation Code			Grant Number:	Enter Grant No	mber		
	Grant Status:	Select Option		~	Disaster:	Select Option		·	
	Obligation Date From:	mm/dd/yyyy			Obligation Date To:	mm/dd/yyyy			
	Public Action Plan Status:	select Uption		~	Action Plan Status:	submitted - A	wait for Kevlew		
				Rese	Search				
	Matching Results 2	1							
	Copy Print CSV Excel	ma Grant Number	Gran	t Status	Bublic Action Blan Status		Action Blan Status	Actions	
	LA Louisiana	8-11-DN-22-0001	Active		Public Action Plan Status		Submitted - Await for Review	Actions	•
	LA Louisiana	RHP-LA	Active				Submitted - Await for Review	e	•
2	The "Review A a. Select the li b. Review sub c. Add suppor	ction Plan" page load ink to display change mission comments for ting documents to th	ds. From rs from rom th ne revie	m this pag the previ e Grantee ew.	ge the HUD us ously reviewe ; and	er can e d and ap	asily: proved Action F	Plan;	
		The n	emaind	er of this p	age intentional	lly left bla	nk.		



r Role: HUD User	Menu Option: OReview Action	on Plan
	·	
Back to Previous Screen		
Grant Number: B-08-DN-22-0001		Grantee Name: Louisiana
LOCCS Authorized Amount: \$34,183,994.00		Grant Award Amount: \$34,183,994.00
Estimated PI/RL Funds: \$1,492,496.02		Total Budget: \$35,676,490.00
Status:		
Submitted - Await for Review Save Review I Cancel Review Action Plan		
Changes from Prior Review a		
Display changes from prior approved review		
SUBMISSIONS COMMENTS Action Plan Submission Comments		
None Action Plan Review Comments		
C		
ADD DOCUMENTS IN SUPPORT OF REVIEW		
Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .	.doc.docx.ads.adsx.ppt.ppbr.pdf	

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3 After completing the review, the HUD user changes the status of the plan to "approved" or "rejected" using the status dropdown options. Select **<Save Review>** to save the changes. This action changes the status as selected and makes the Action Plan available for Grantee modifications.

aak is Previous Screen rark Names rark N	
answing: contract Name: op One 32 or 0001 contract Name: SCS Authorized Amount: contract Amount Autisser contract Amount Submitted - Await for Review contract Amount Save Review Concol Review Action Plan Save Review Concol Review Action Plan Save Review Concol Review save Review Concol Review Action Plan Save Review Concol Review Action Plan Save Review Concol Review Comments save Review Concol Review Comments save Review Comments Concol Review Comments DD DOCUMENTS IN SUPPORT OF REVIEW Concol Review Comments ** Valid file extension area ong off togo goeg doc cdoc cols advace pations of togo	
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