Chapter 17: Technical Assistance Work Plans| Manage My Grants Module

Chapter 17: Technical Assistance Work Plans

This Chapter provides instructions for Grantee Users associated with a Technical Assistance Provider organization (TA Providers) to manage TA Work Plans in the DRGR System. TA Providers manage TA Work Plans within the **Manage My Grants** module. TA Work Plans populate as Activities on the related Action Plans in DRGR.

This Chapter is divided into subsections. The following actions are covered in this Chapter:

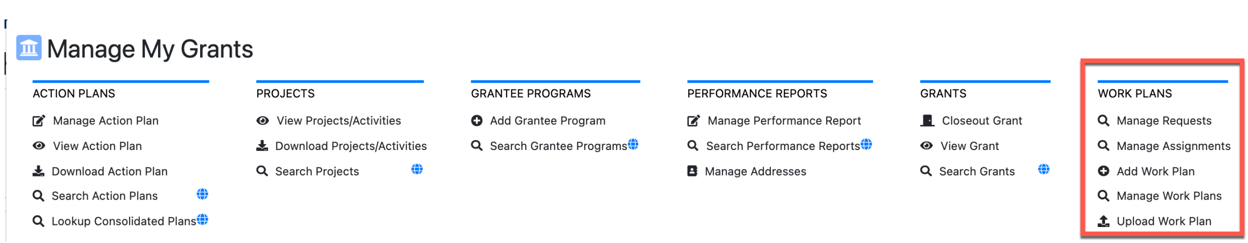
Grantee Users

Menu Option	Subsection	Action
Add Work Plan	B1	Add TA Work Plan to Action Plan
Manage Work Plans	C	Search for and Manage Work Plans
Upload Work Plan	D	Upload Work Plan information using data upload template

A. Manage My Grants Module Access

The Manage My Grants Module contains the TA Work Plan functions.

A1. Grantee | User Access

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow TA Providers to access Work Plan actions.	
Complete the following steps to access the Manage My Grants Module:	
1 In the DRGR System, select the **Manage My Grants** module, or icon, located in the navigation menu.  	
2 This opens the dropdown menu items for the **Manage My Grants** module. The DRGR System displays Work Plan functions under the Work Plan menu, as highlighted in the screenshot.  	

B. Add Work Plans

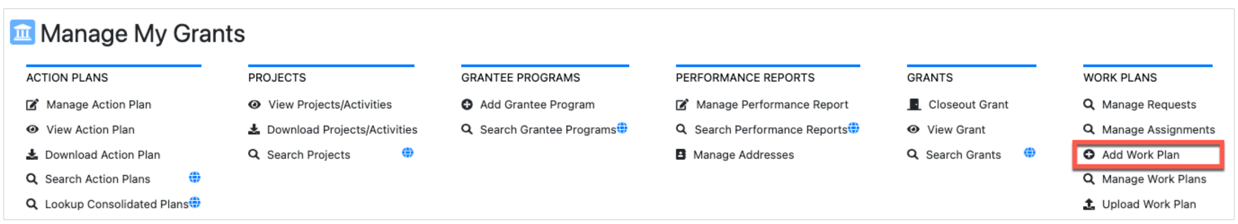
TA Providers can add TA Work Plans in DRGR. The ability to add a Work Plan is not available to View Only users.

B1. Grantee | Add Work Plan

User Role: Grantee User	**Menu Option:** Add Work Plan
Purpose: Allow TA Providers to add a DRGR Work Plan.	

Complete the following steps to add a DRGR Work Plan:

1 Navigate to the **Manage My Grants module**, or icon. Locate the **Action Plan** menu as described in Section AI above. Select <**Add Work Plan**>. The **"Add TA Work Plan"** page will load.



2 After specifying requested information marked with asterisks and selecting **<Save>** on the **"Add Work Plan"** page, the **"Manage Work Plan"** page is displayed. The "New TA Work Plan has been created successfully" message appears at the top of the page.

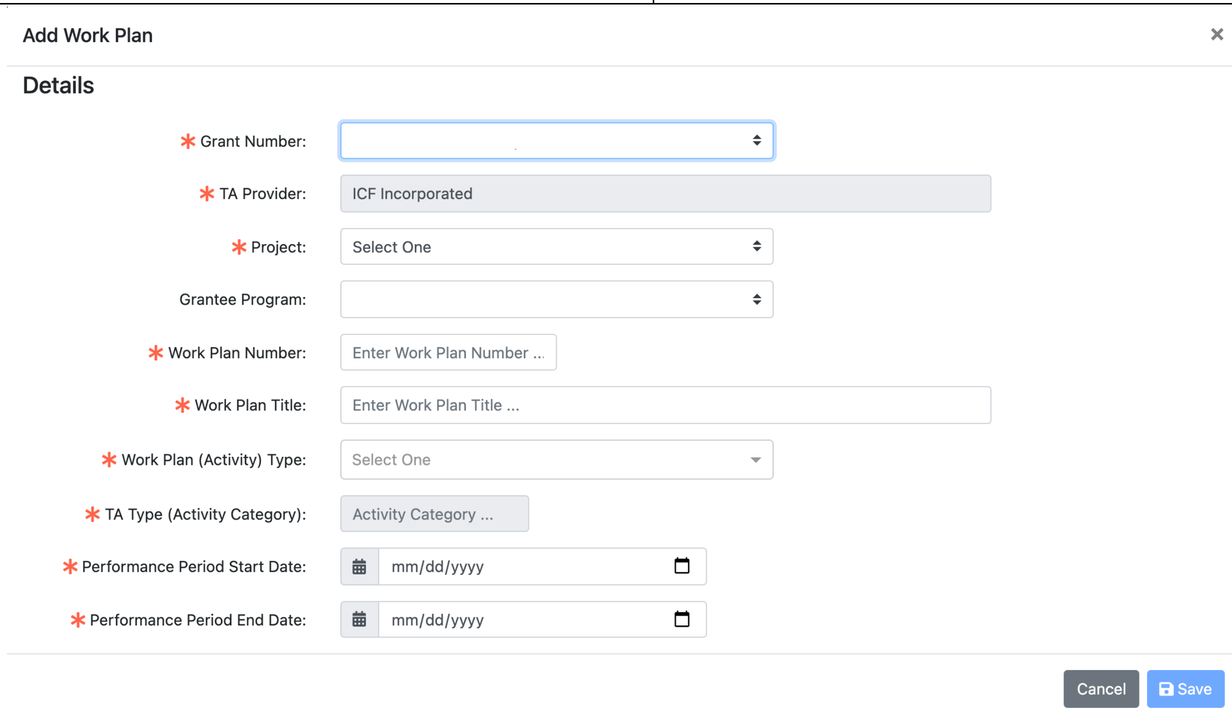
TIP: If the DRGR System displays errors, be sure that:

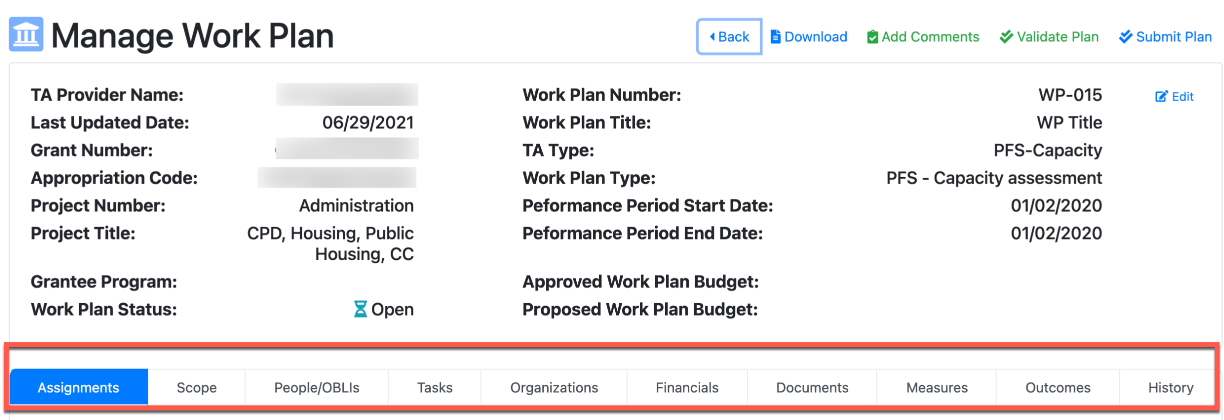
- all mandatory fields are complete; and
- sufficient funds are available to support the work plan budget.

The **"Manage Work Plan"** page header includes TA Provider Name, Last Updated Date, Grant Number, Appropriation Code, Project Number, Project Title, Grantee Program, Work Plan Status, Work Plan Number, Work Plan Title, TA Type, Work Plan Type, Performance Period Start Date, Performance Period End Date, Approved Work Plan Budget, and Proposed Work Plan Budget.

Following tabs are available on the **"Manage Work Plan"** page: Assignments, Scope, People/OBLIs, Tasks, Organizations, Financials, Documents, Measures, Outcomes, and History.

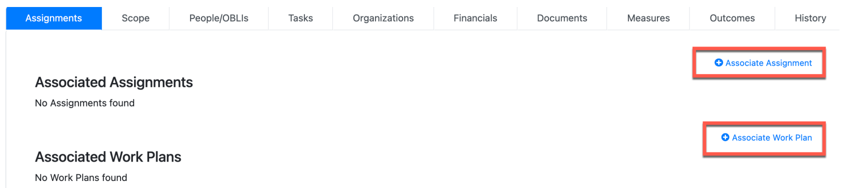
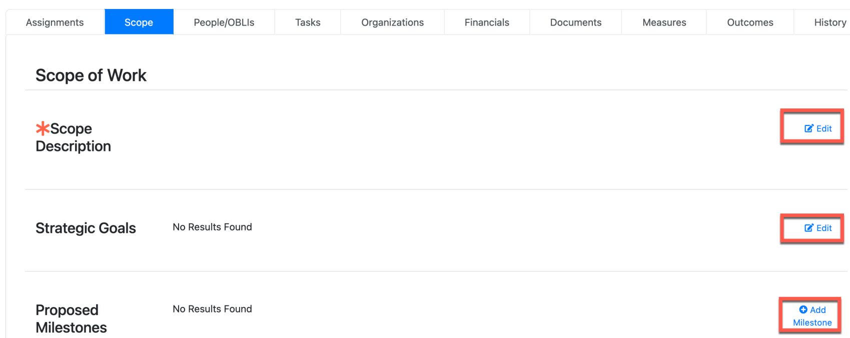
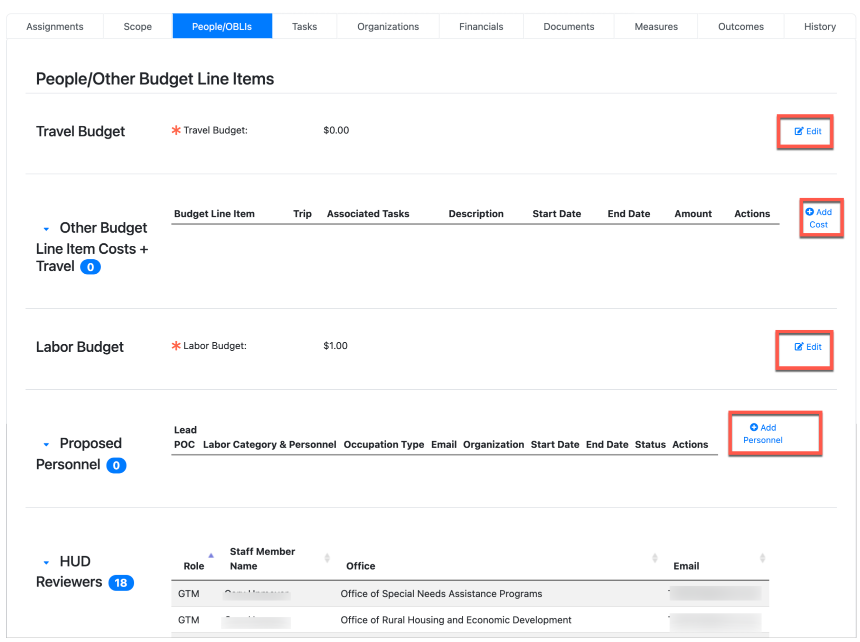
User Role: Grantee User	**Menu Option:** ⊕ Add Work Plan

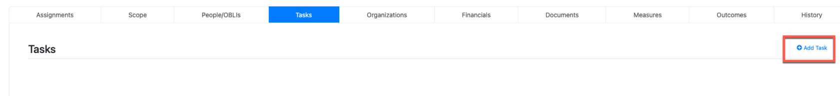


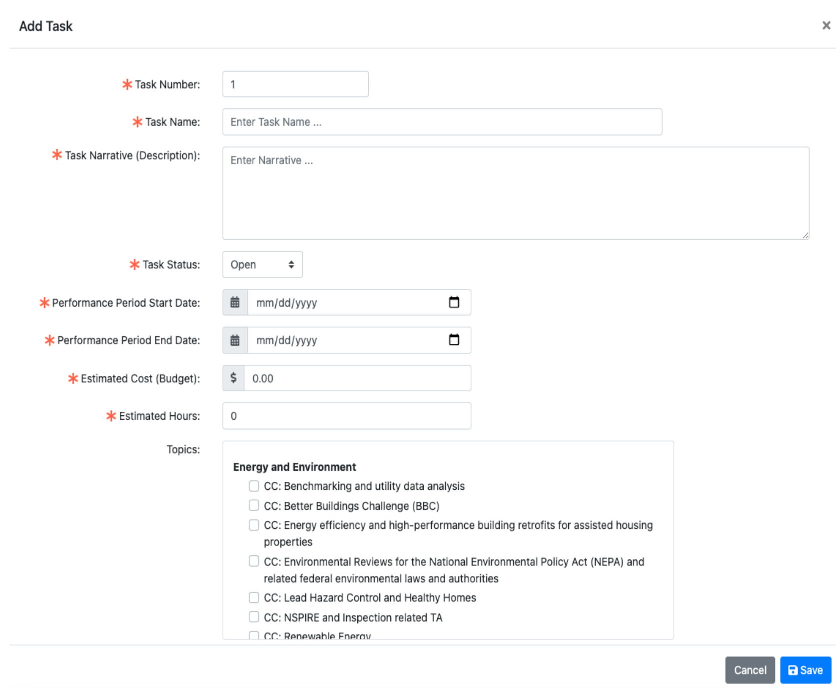


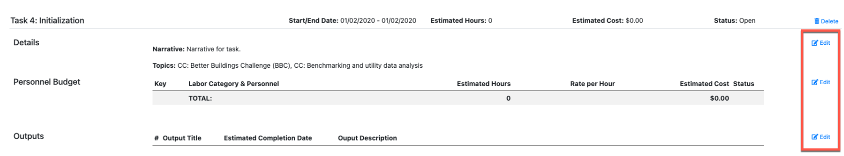
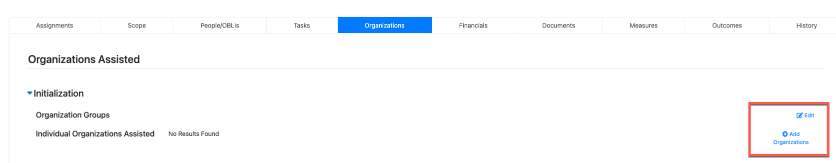
Refer to the table below to complete the Work Plan using available tabs.

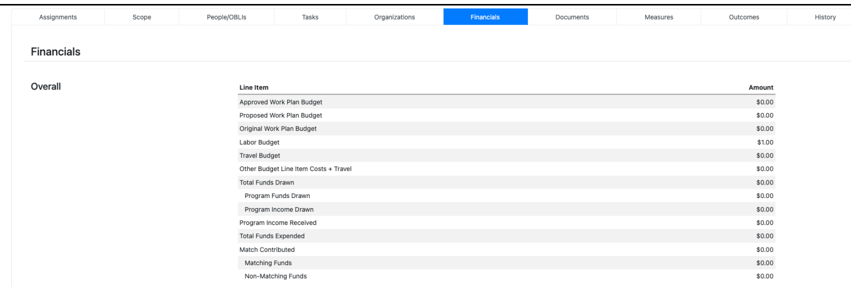
Tabs to Complete Work Plan

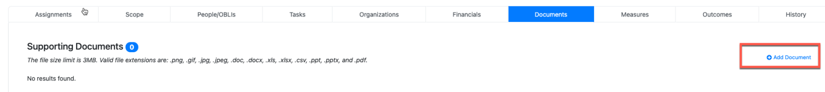
<table>
<tr><th>Tab</th><th>Notes</th></tr>
<tr><td>Assignments</td><td>The System allows TA Provider to associate assignments and other work plans.

</td></tr>
<tr><td>Scope</td><td>The System allows TA Provider to add Scope, Strategic Goals, Proposed Milestones.

</td></tr>
<tr><td>People/OBLIs</td><td>The System allows TA Provider to include Travel Budget, Other Budget Line-Item Costs + Travel, Labor Budget, and Proposed Personnel. A list of HUD Reviewers is also displayed at the end of the tab.

</td></tr>
</table>

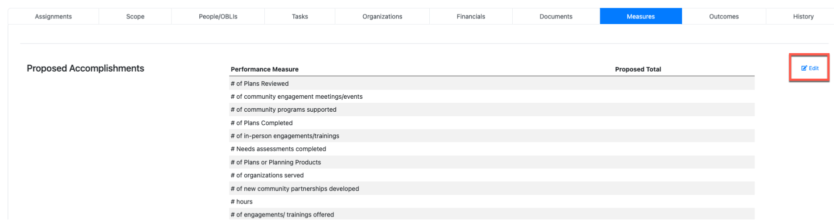
<table>
<tr><td>Tasks</td><td>The System allows TA Provider to add tasks and related information from this tab.


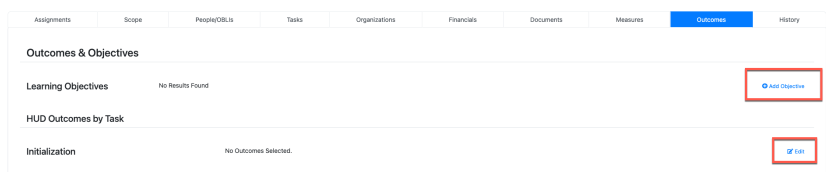


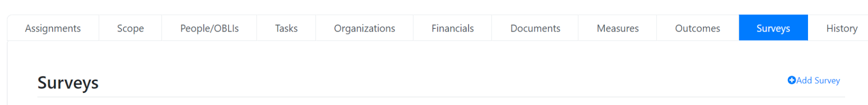
TA Providers can expand the task after it is created by clicking the blue arrow to complete information for Details, Personnel, and Outputs.

</td></tr>
<tr><td>Organizations</td><td>The System allows TA Provider to add Organization Groups and Individual Organizations Assisted for each task from this tab.

</td></tr>
<tr><td>Financials</td><td>The System provides Overall Financials in this tab.</td></tr>
</table>

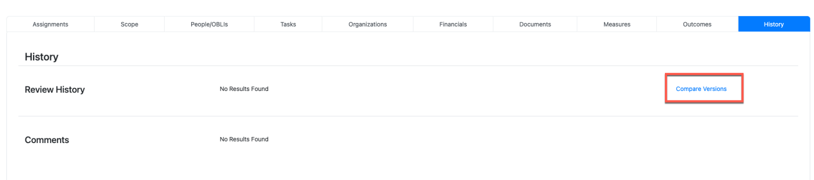
<table>
<tr><td></td><td>
</td></tr>
<tr><td>Documents</td><td>The System allows TA Provider to add supporting documents from this tab.


</td></tr>
<tr><td>Measures</td><td>The System allows TA Provider to specify proposed accomplishments from this tab.


</td></tr>
<tr><td>Outcomes</td><td>The System allows TA Provider to add Outcomes & Objectives from this tab.


</td></tr>
<tr><td>Survey</td><td>Where applicable, the System allows users to set up surveys from this tab.


</td></tr>
<tr><td>History</td><td>TA Providers can view the History of the Work Plan and compare previous versions using this tab.

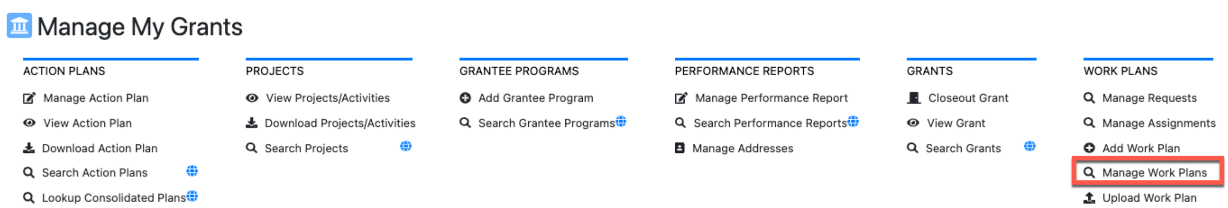

</td></tr>
</table>

C. Manage Work Plans

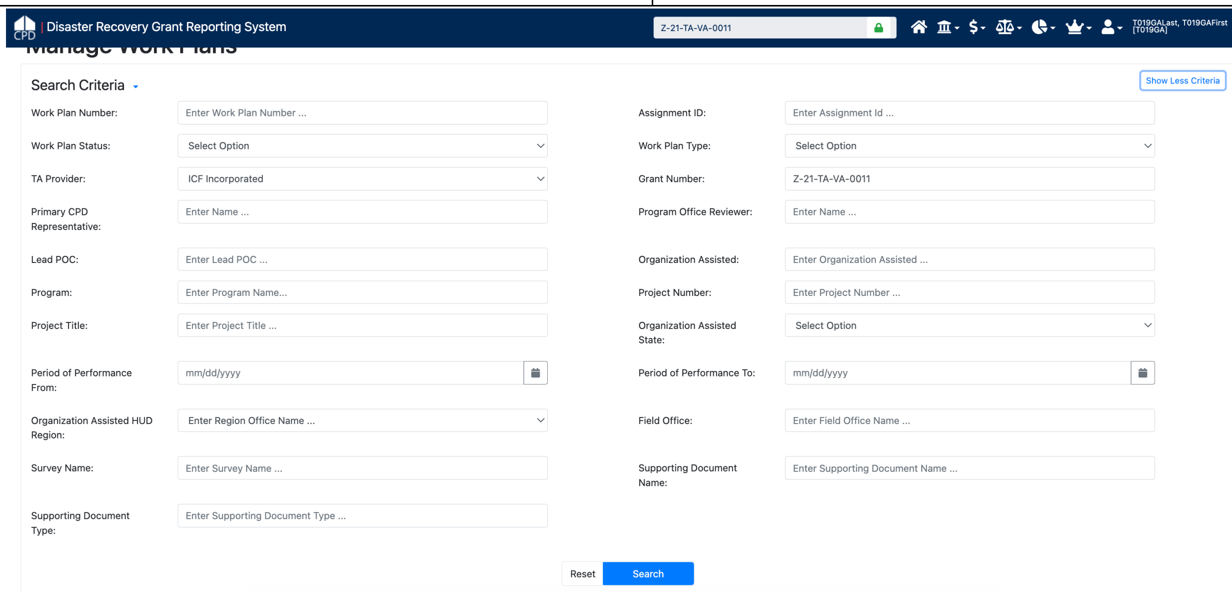
After a Work Plan is created, TA Provider Users may search for Work Plans and edit them, as needed. TA Provider Users can edit the fields that were populated during the process of creating the Work Plan, however, only TA Provider Users with the Staff Rate role can see staff rates on a TA Work Plan. Other TA Provider Users cannot see staff rates. For more information on user roles, see Chapter 5 – User Management and Certifications.

When editing a TA Work Plan, the Work Plan status will change to "Modified – Resubmit When Ready." TA Provider Users must submit the Work Plan again so that it can be re-approved by HUD. TA Providers can also upload Work Plan edits (see Chapter 34 – Data Uploads for more information).

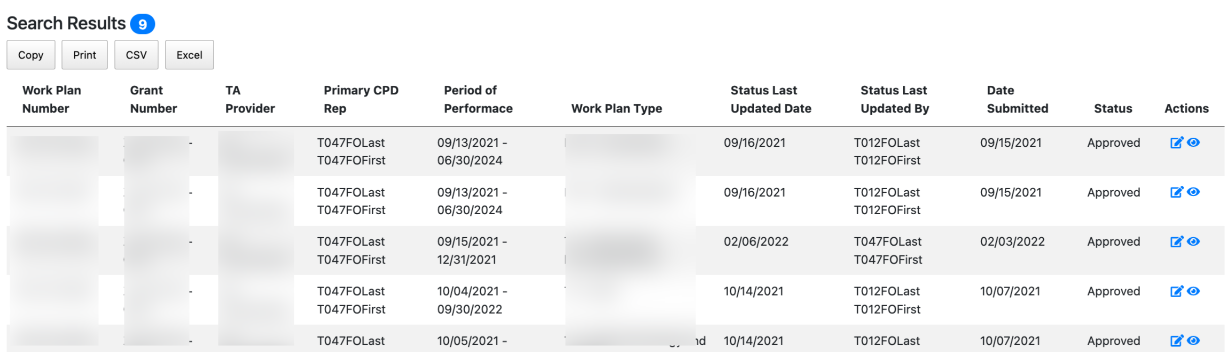
C1. Grantee | Manage Work Plans

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to manage a DRGR Work Plan.	
Complete the following steps to add a DRGR Work Plan:	
1	Navigate to the **Manage My Grants module** or icon. Locate the **Action Plan** menu as described in Section A1 above. Select <**Manage Work Plans**>. The **"Manage Work Plans"** page will load. 
2	TA Providers can search for Work Plans using following criteria: Work Plan Number, Work Plan Status, TA Provider, Primary CPD Representative, Lead POC, Assignment ID, Work Plan Type, Grant Number, Program Office Reviewer, and Organization Assisted. Additional search criteria are revealed by clicking on **<Show More Criteria>**.

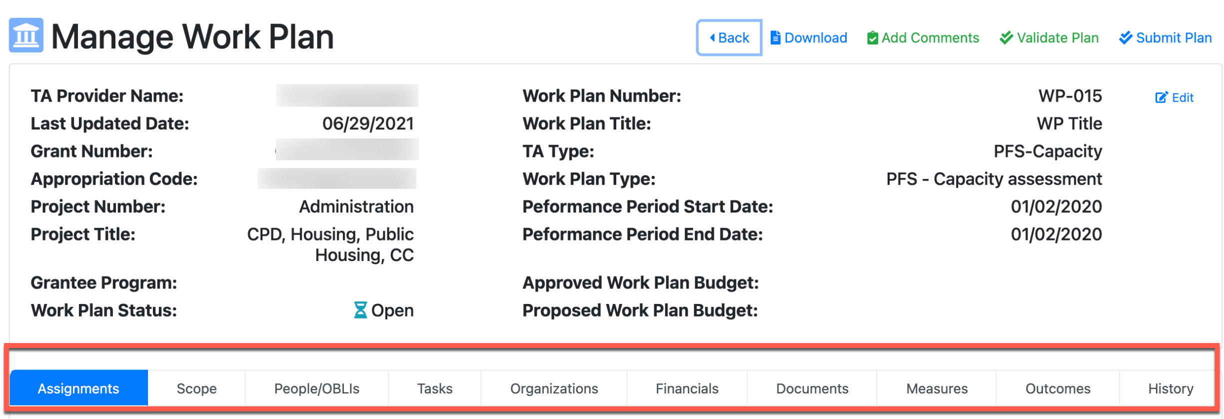
User Role: Grantee User	Menu Option: Manage Work Plans



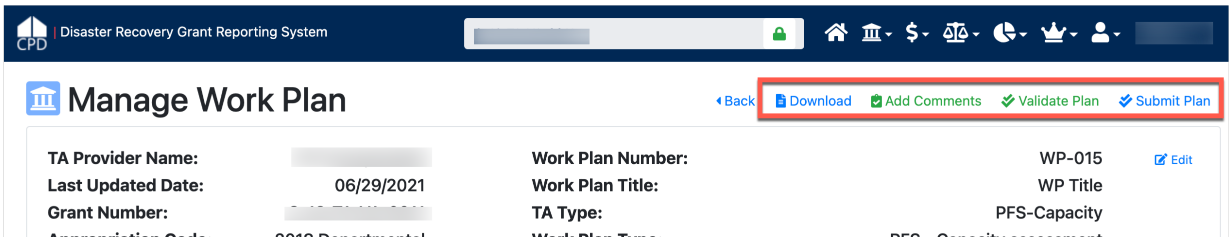
Selecting **<Search>** will display the results with following information: Work Plan Number, Grant Number, TA Provider, Primary CPD Rep, Period of Performance, Work Plan Type, Status Last Updated Date, Status Last Updated By, Date Submitted, Status, and Actions.

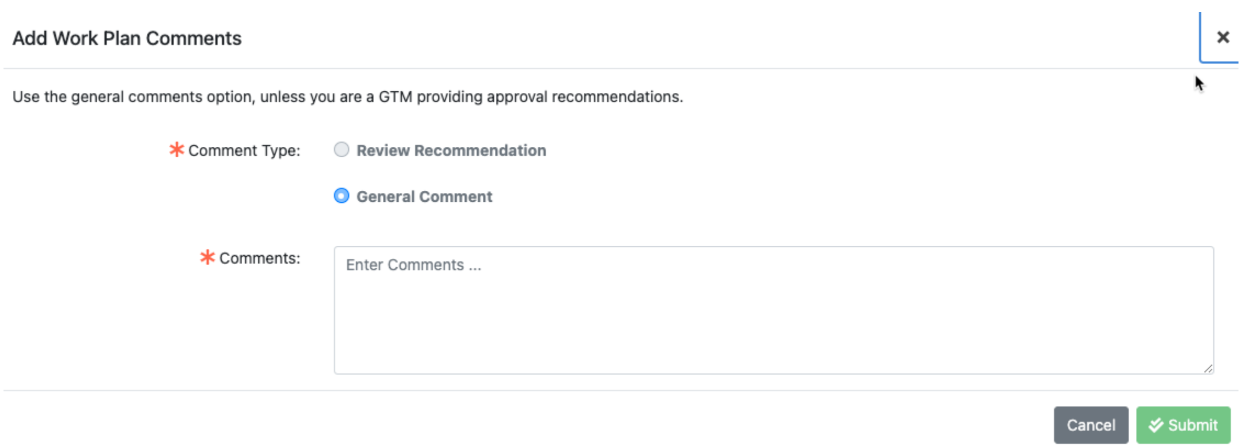


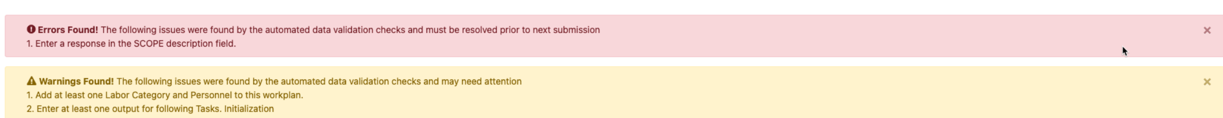
Clicking on the **<Edit>** action will allow TA Provider to navigate to the Manage Work Plan page.



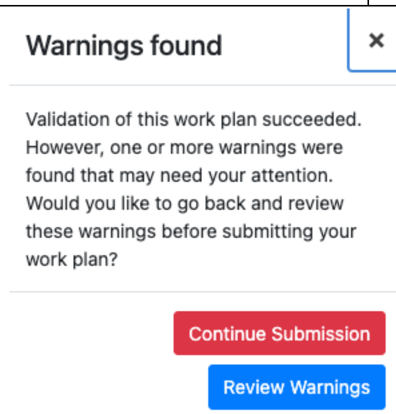
User Role: Grantee User	**Menu Option:** Manage Work Plans
	Refer to the Section B1 above to add/edit Work Plan information using each tab.
3	Secondary navigation available on the **"Manage Work Plan"** page allows Users to add comments, validate Work Plan, and Submit Work Plan for HUD Review.
4	TA Providers can use the **<Download>** action on the **"Manage Work Plan"** page to download the Work Plan in a PDF format.
5	TA Providers can use the **<Add Comments>** action on the "**Manage Work Plan"** page to add Work Plan Comments.
6	TA Providers can use the **<Validate Plan>** action on "**Manage Work Plan"** page to validate the Work Plan and provide a list of Warnings and Errors.
7	TA Providers can use the **<Submit Plan>** action on the "**Manage Work Plan"** page to submit the Work Plan. The System sends an email to the CPD Rep and the Work Plan creator upon submitting the Work Plan. TA Providers must resolve all the errors prior to submitting the Work Plan. An alert is displayed prior to submission when warnings are found. TA Providers can review the warnings and proceed accordingly.



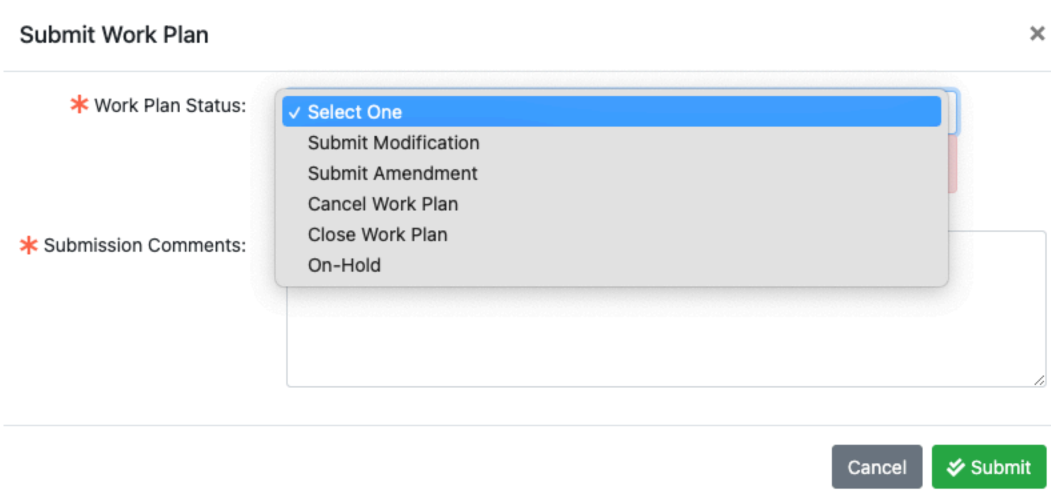




User Role: Grantee User	**Menu Option:** Manage Work Plans



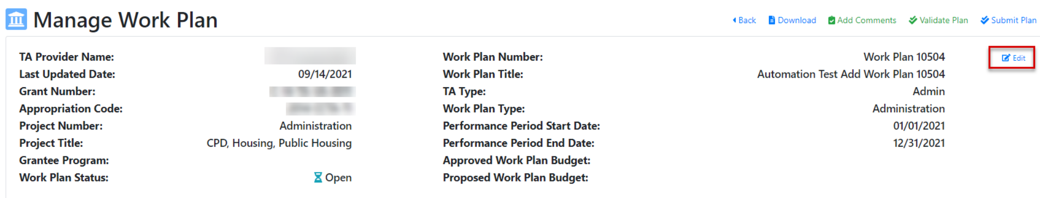
8 TA Providers will have the option to submit the Work Plan using following options: Submit Modification, Submit Amendment, Cancel Work Plan, Close Work Plan, or On-Hold.



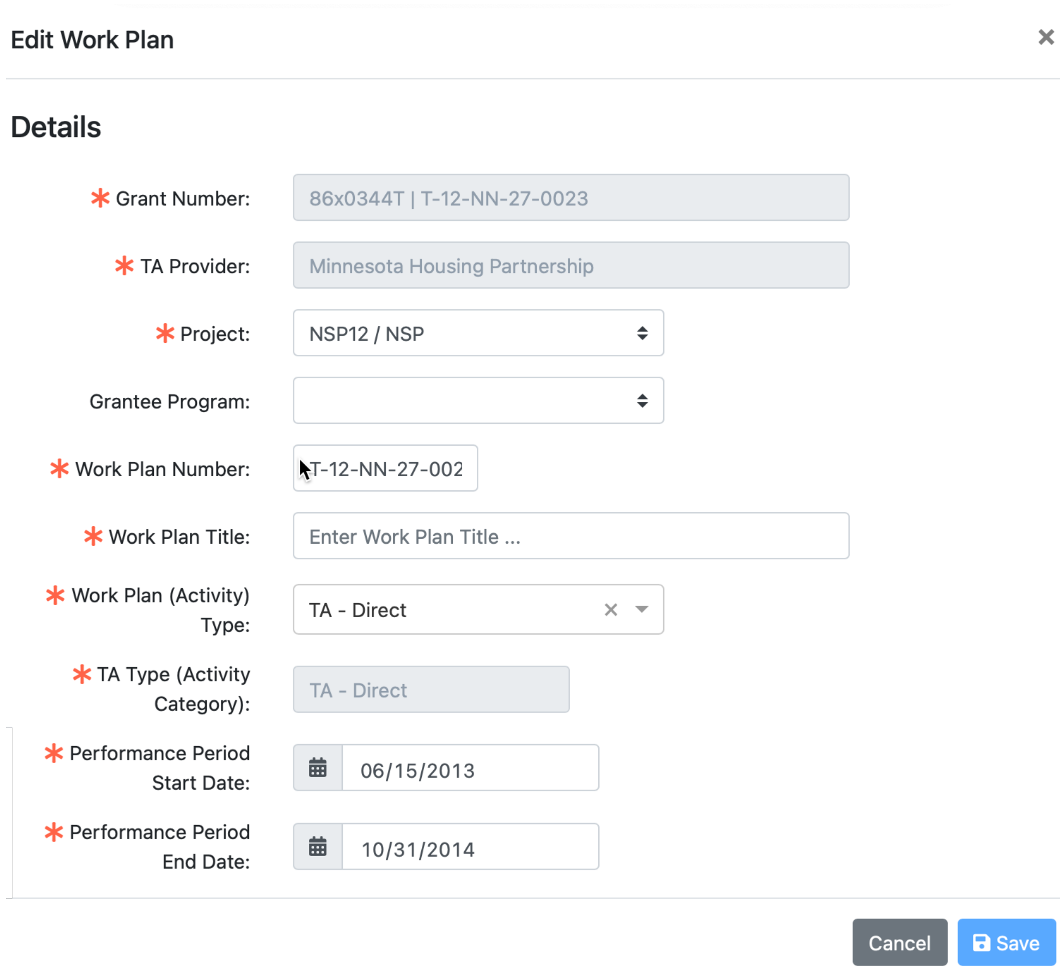
C2. Grantee | Edit Work Plan Details

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to edit the content of a Work Plan.	
Complete the following steps to edit a Work Plan:	
1 Follow the steps provided in Section C1. Then, select the pencil icon ( ) in the actions column to navigate to the Manage Work Plan page.	

User Role: Grantee User	**Menu Option:** Manage Work Plans
2 Select the **<Edit>** action in the header.	



The **"Edit Work Plan"** page will be displayed. TA providers can update Project, Grantee Program, Work Plan Number, Work Plan Title, Work Plan (Activity) Type, TA Type (Activity Category), Performance Period Start Date, Performance Period End Date using the "**Edit Work Plan"** page.



Selecting <**Cancel>** will allow TA Providers to cancel any updates made to the Work Plan. Selecting <**Save>** allows TA providers to save the updates made to the Work Plan.

Saving the changes will trigger a success message "**TA Work Plan has been saved successfully"**.

Information in individual tabs can be edited as specified in sections **C4 – C22** below.

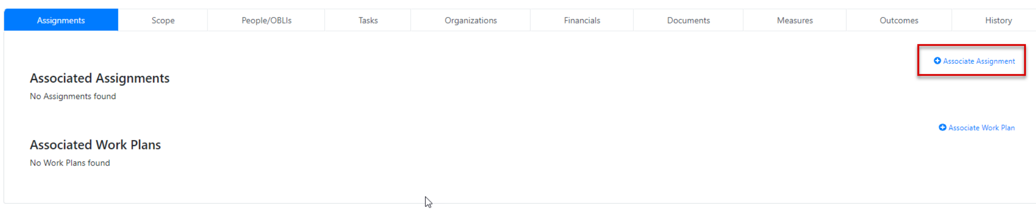
C3. Grantee | Associate Assignments

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to associate assignments to a Work Plan.	

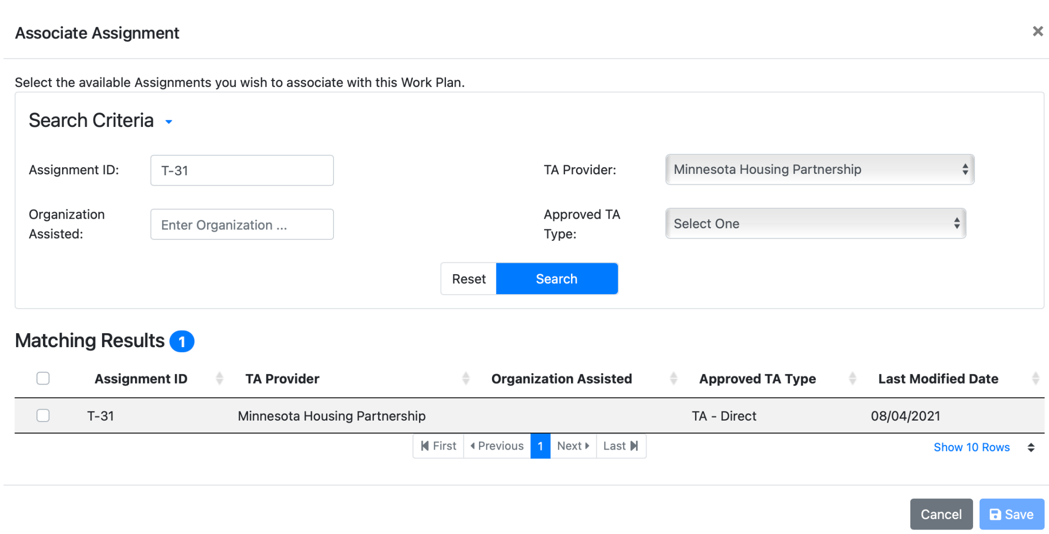
Complete the following steps to associate assignment to a Work Plan:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon ( ) in the Actions column to navigate to the **"Manage Work Plan"** page.

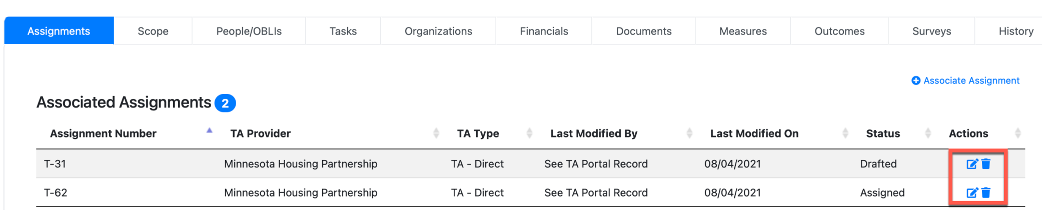
3 Select the **Assignments** tab. Then, select <**Associate Assignment>** to display the "**Associate Assignment"** page.



TA Providers can search using Assignment ID, TA Provider, Organization Assisted, and Approved TA Type. Provide the search criteria and select <**Search>** to retrieve results.



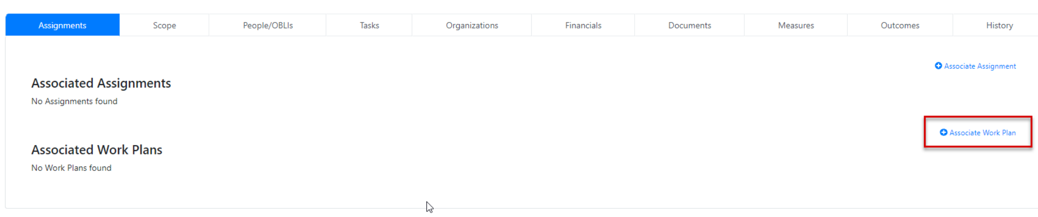
4 Select the assignments that are to be associated to the Work Plan. Then, select <**Save>** to complete the association. A success message is displayed on the top right corner and associated assignments will be displayed in the **Assignments** tab.



User Role: Grantee User	**Menu Option:** Manage Work Plans
The following details are provided for associated assignments: Assignment Number, TA Provider, TA Type, Last Modified By, Last Modified On, Status. Selecting the pencil icon in the Actions column allows TA Providers to navigate to the **"Manage Assignment"** page for the selected assignment. Selecting the trash can icon **in the Actions column** will delete the current association.	

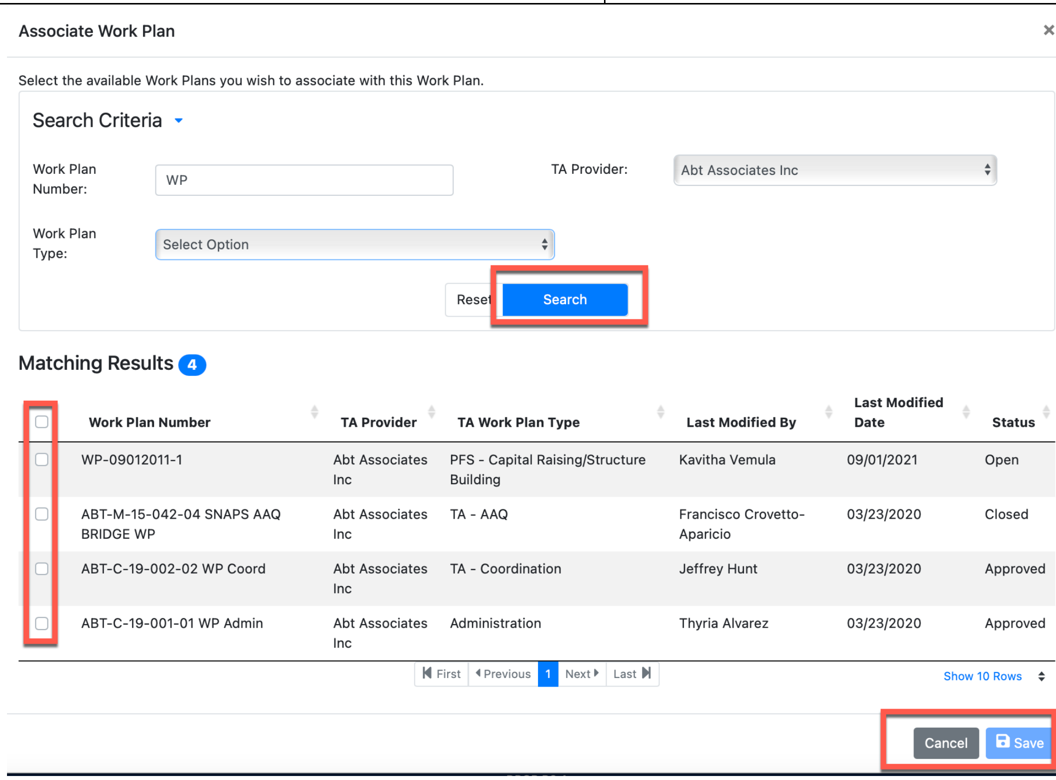
C4. Grantee | Associate Work Plans

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to associate Work Plans to another Work Plan.	
Complete the following steps to associate Work Plan to another Work Plan:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.
2	Select the **Assignments** tab. Then, select <**Associate Work Plan**> from the **Assignments** tab to display the "**Associate Work Plan"** page.

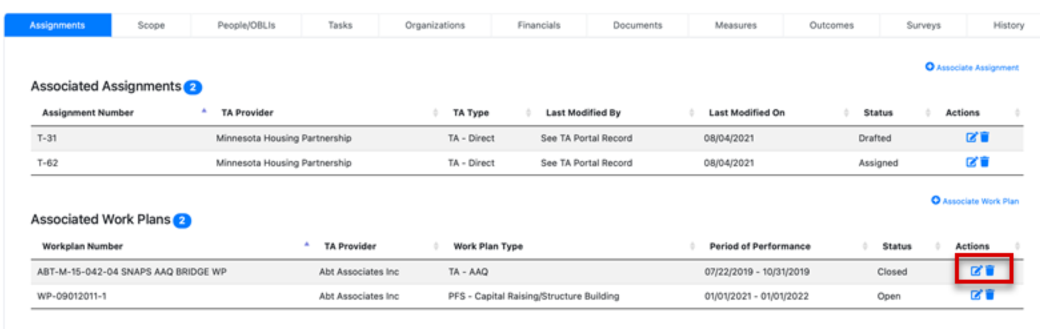


TA Providers can search by Work Plan Number, TA Provider, and Work Plan Type to retrieve appropriate Work Plans to associate. Select the Work Plan and select <**Save**> to associate a Work Plan.

User Role: Grantee User	Menu Option: Manage Work Plans



6 A success message is displayed after successful association, and associated Work Plans are displayed on the **Assignments** tab.

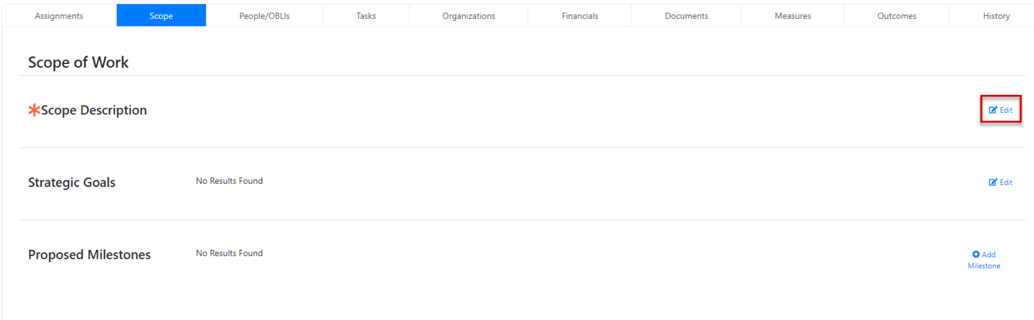


Select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page for the selected Work Plan. Select the trash can icon in the Actions column to delete the association.

C5. Grantee | Edit Scope Description

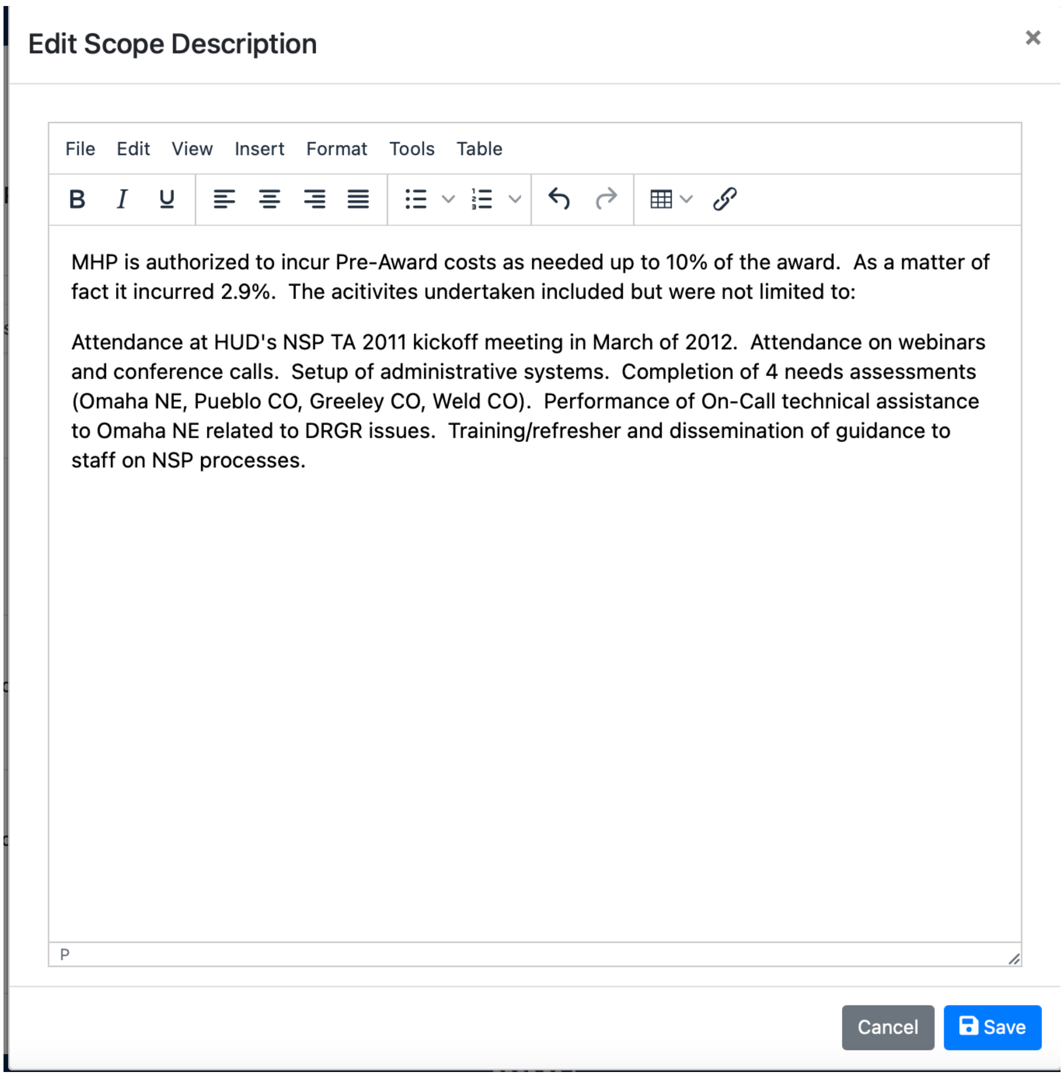
User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to add or edit scope for a Work Plan.	
Complete the following steps to add or edit the scope of a Work Plan:	

User Role: Grantee User	**Menu Option:** Manage Work Plans
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **“Manage Work Plan”** page.
2	Select the **Scope** tab. Then, select <**Edit**> in the **Scope Description** section. The “**Edit Scope Description”** page will open.



The remainder of this page is intentionally blank.

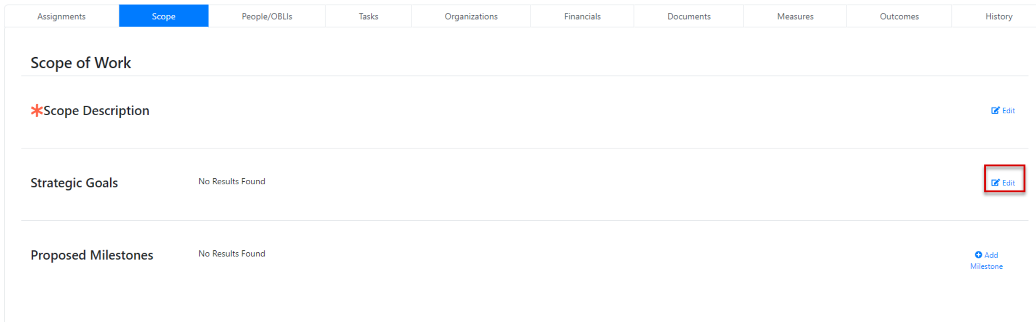
User Role: Grantee User	**Menu Option:** Manage Work Plans
3	Enter the desired narrative in the text area. Select <**Save**> to save the scope description. A success message is displayed upon saving the scope description.

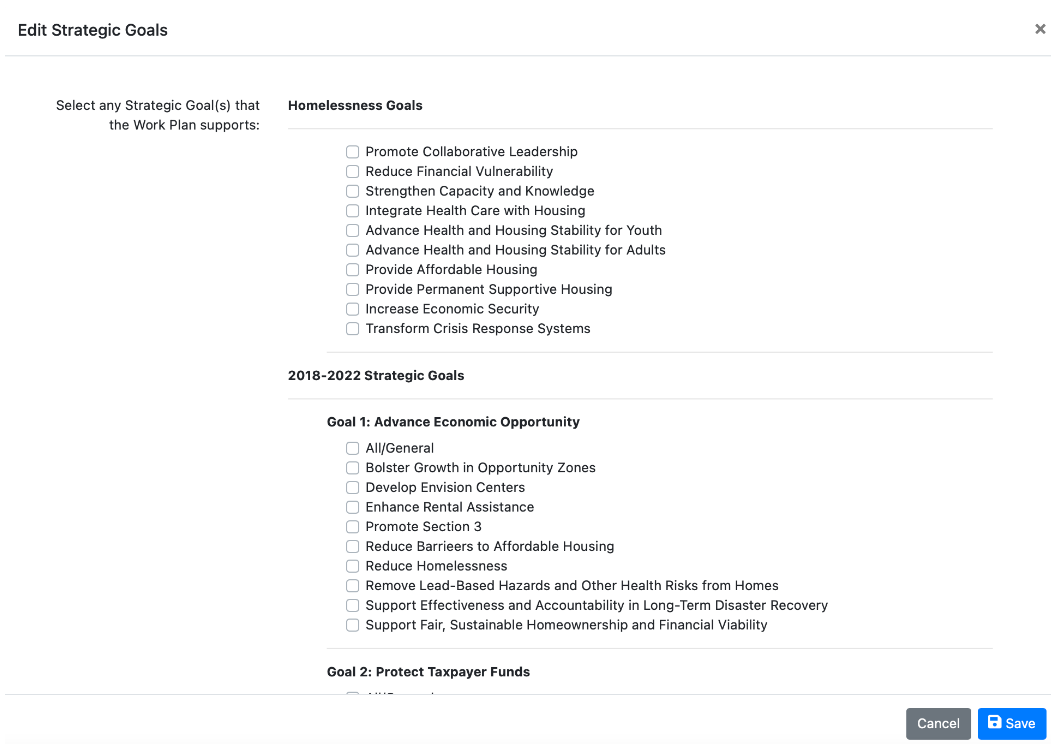


C6. Grantee | Edit Strategic Goals

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to add or remove Strategic Goals for a Work Plans.	
Complete the following steps to add or remove strategic goals:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

<table>
<tr><th>User Role: Grantee User</th><th>Menu Option: Manage Work Plans</th></tr>
<tr><td>2</td><td>Select the Scope tab. Select <Edit> in the Strategic Goals section. The “Edit Strategic Goals” page is displayed.


</td></tr>
<tr><td>3</td><td>Select the applicable strategic goals and select <Save>. A success message is displayed to confirm that addition of strategic goals to the Work Plan.


</td></tr>
</table>

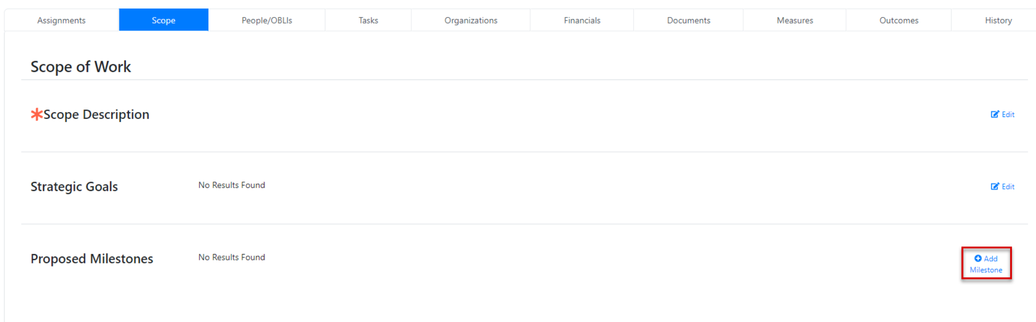
C7. Grantee | Manage Proposed Milestones

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to add, edit, and delete Milestones for a Work Plans.	

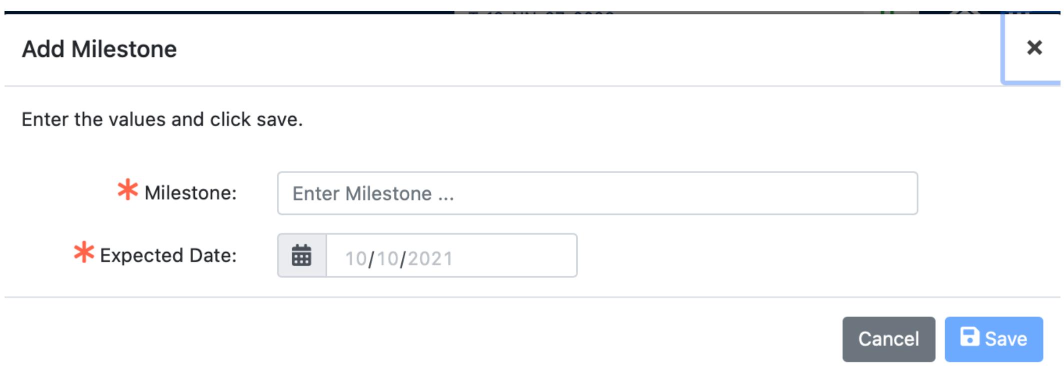
Complete the following steps to manage add, edit, and delete milestones:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

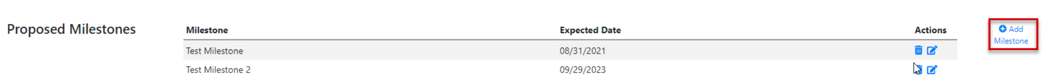
2 In the **Scope** tab, select <**Add Milestone**> in the **Milestone** section to open the **"Add Milestone"** window.



3 Specify the **Milestone** and **Expected Date**. Then, select <**Save**> to add the milestone to current Work Plan.

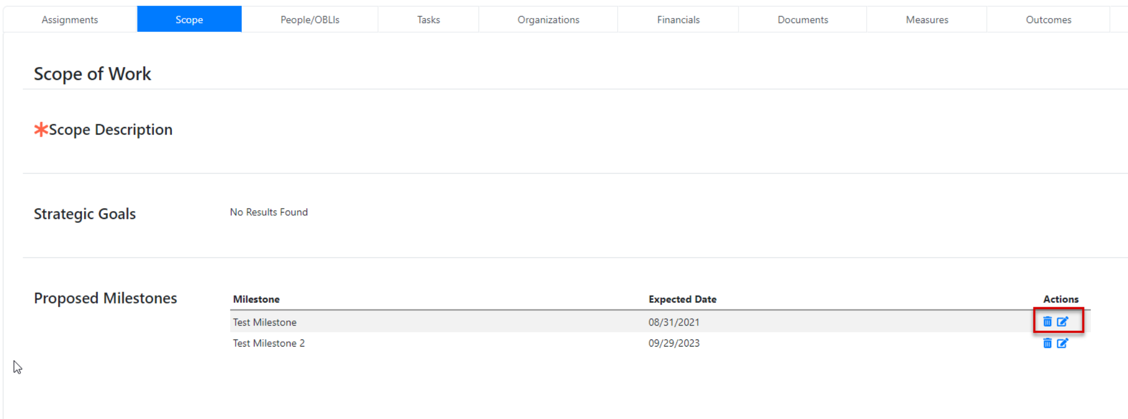


The milestone is displayed in a table.



User Role: Grantee User	**Menu Option:** Manage Work Plans

4 Select the pencil icon in the Actions column to modify the selected milestone. Select the trash can icon in the Actions column to delete the milestone.



C8. Grantee | Edit Travel Budget

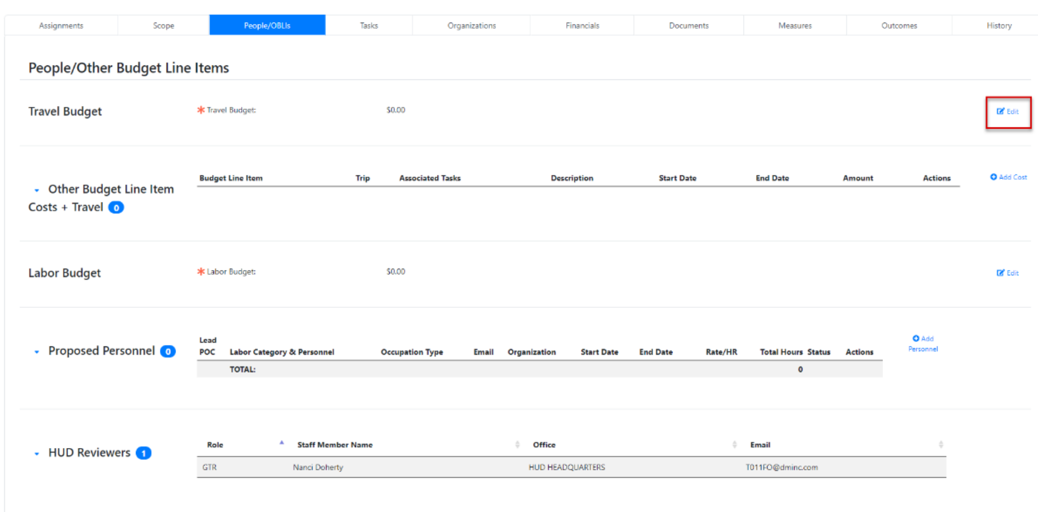
User Role: Grantee User	**Menu Option:** Manage Work Plans

Purpose: Allow TA Provider Users to edit the Work Plan's travel budget.

Complete the following steps to edit the travel budget:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

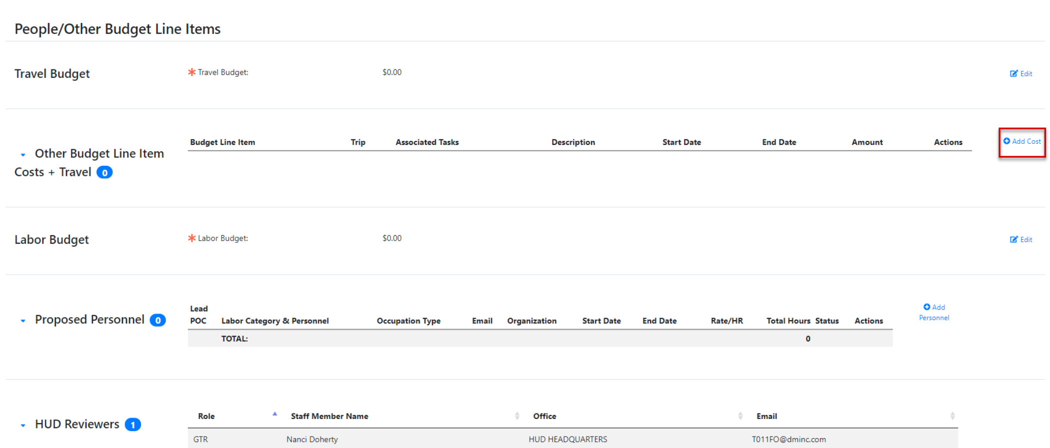
2 Select the **People/OBLIs** tab. Then, select **<Edit>** in the **Travel Budget** section. The "**Edit Travel Budget"** page will open.

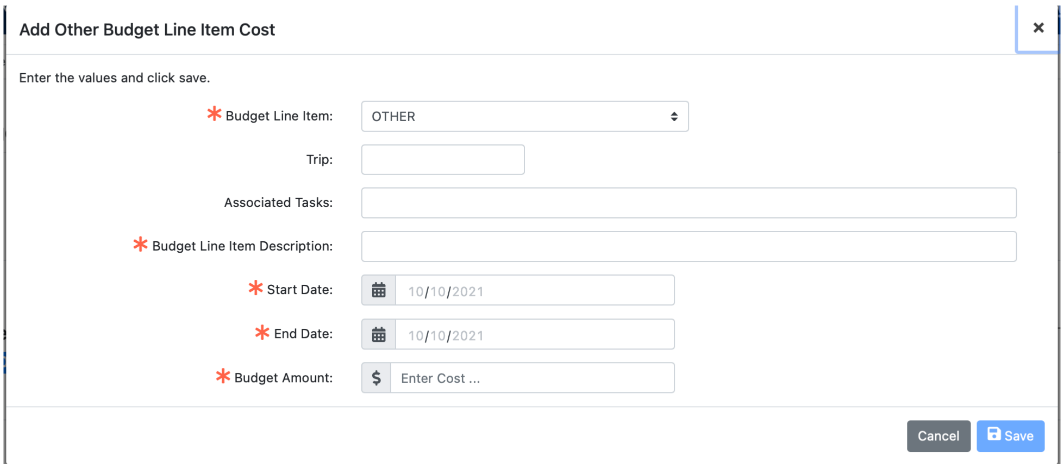
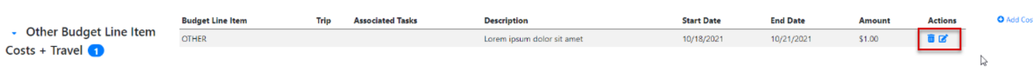


User Role: Grantee User	**Menu Option:** Manage Work Plans
3 Enter the amount and select <**Save**> to add the travel budget to the current Work Plan. A success message is displayed upon saving the travel budget.	

C9. Grantee | Manage Other Budget Line Item Costs and Travel

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to add other budget line item costs to a Work Plans.	
Complete the following steps to add other budget line item costs:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	
2 Select the **People/OBLIs** tab. Then, select **<Add Cost>** in the **Other Budget Line Item Costs + Travel** section. The "**Add Other Budget Line Item Cost"** page will open.	



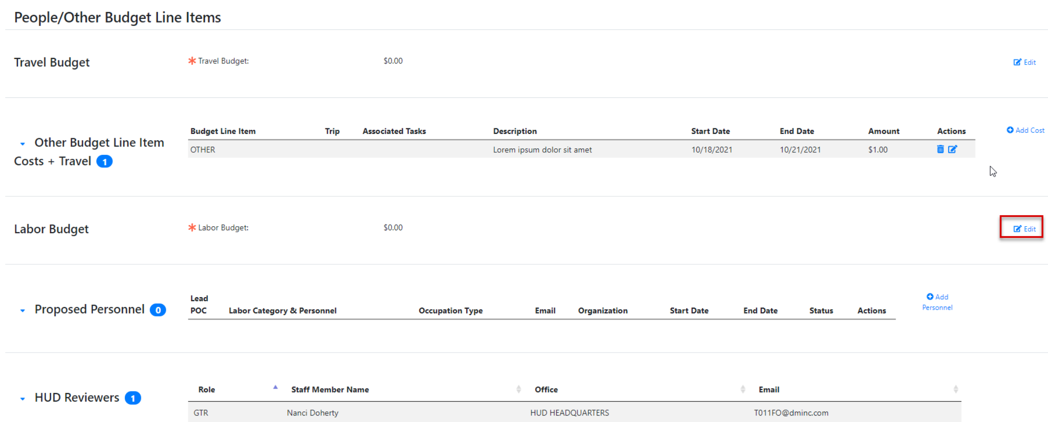
User Role: Grantee User	**Menu Option:** Manage Work Plans
3	TA providers can select a Budget Line Item, provide information for Trip, Associated Tasks, Budget Line Item Description, Start Date, End Date, Budget Amount, and select <**Save**>. A success message is displayed after adding the budget line item. 
4	The newly added cost is displayed in a table. Select the pencil icon in the Actions column to modify the selected cost. Select the trash can icon in the Actions column to delete the cost. 

C10. Grantee | Edit Labor Budget

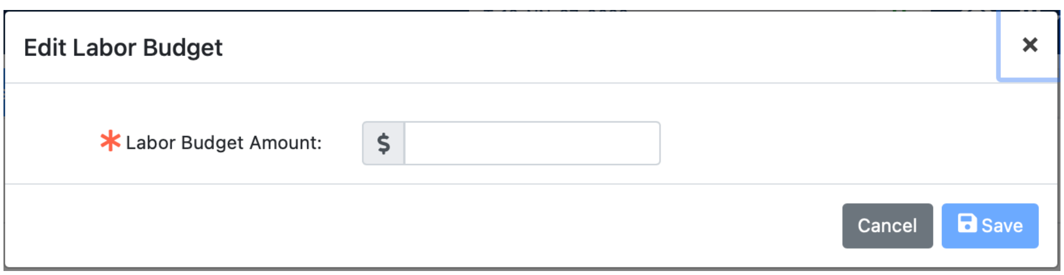
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to update the Labor Budget for a Work Plans.	
Complete the following steps to edit the Labor Budget:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

User Role: Grantee User	**Menu Option:** Manage Work Plans

2 Select the **People/OBLIs** tab. Then, select <**Edit>** in the **Labor Budget** section to open the "**Edit Labor Budget"** window.



3 Enter the amount and select <**Save>** to add labor budget amount. A success message is displayed upon adding a labor budget amount.



C11. Grantee | Manage Proposed Personnel

User Role: Grantee User	**Menu Option:** Manage Work Plans

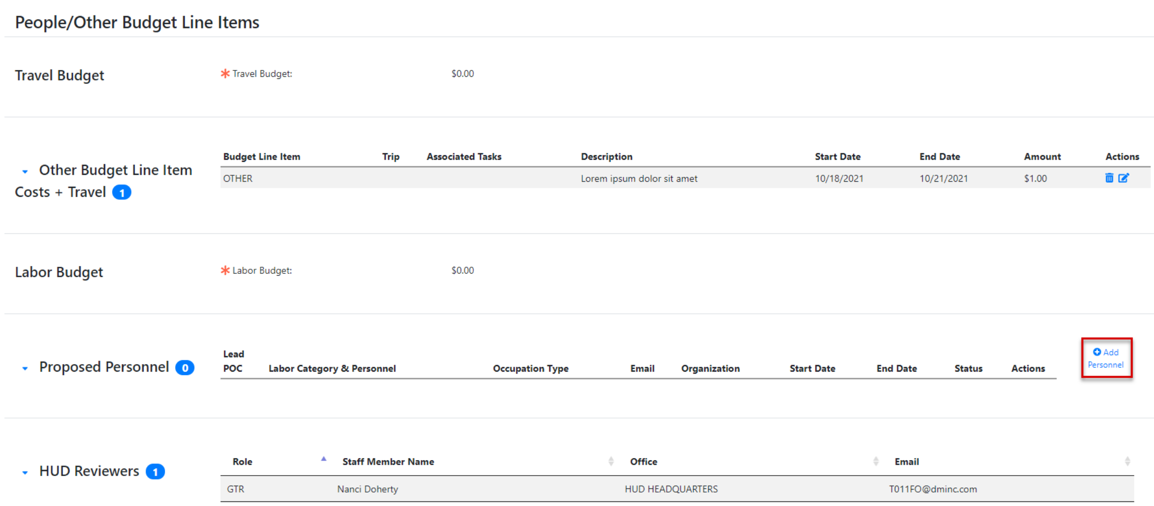
Purpose: Allow TA Provider Users to add personnel to or remove personnel from a Work Plans.

Complete the following steps to add or remove personnel:

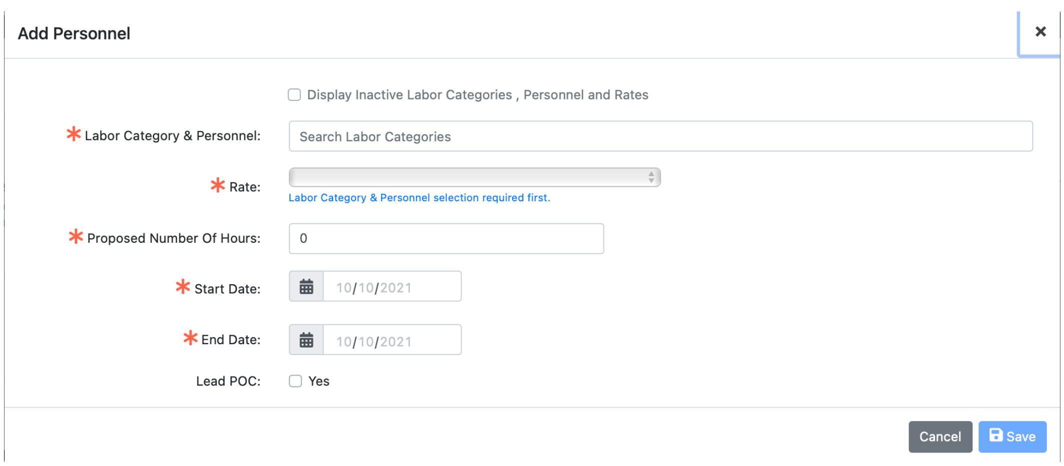
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

User Role: Grantee User	Menu Option: Manage Work Plans

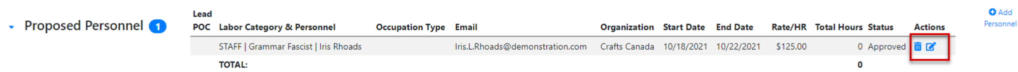
2 Select the **People/OBLIs** tab. Then, select **<Add Personnel>** in the **Proposed Personnel** section to open the **Add Personnel** window.



3 TA providers can search for **Labor Category & Personnel**, and select **Rate, Proposed Number of Hours, Start Date, End Date, Lead POC**. Selecting **<Save>** will add the selected personnel to current Work Plan.



NOTE: The Labor Category & Personnel field is a concatenated field showing the Rate Type for a labor category, the Labor Category name, the Personnel name(s) of individuals associated with the labor category, and the personnel's status. If the labor category that will be used to support the Work Plan is known BUT the specific individual who will be support that Work Plan in that role is still not known, select the labor category with "TBD" specified for the personnel name.

User Role: Grantee User	**Menu Option:** Manage Work Plans
4 The select labor category and rate is displayed in a table.  Select the pencil icon in the Actions column to modify the selected row (e.g., replace TBD with a specific individual's name, change the estimated hours, etc.). If hours have not been allocated to the individual or labor category on the **Tasks** tab, select the trash can icon in the Actions column to remove the labor category and rate.	

C12. Grantee | View HUD Reviewers

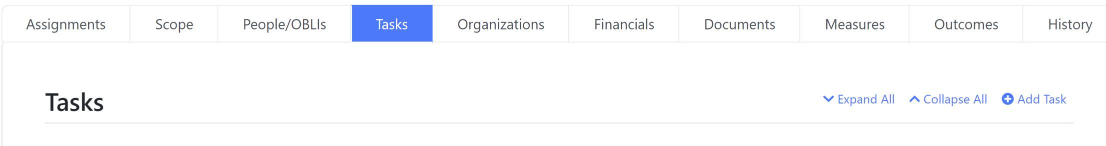
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: View HUD Reviewers associated with a Work Plan.	
Complete the following steps to view HUD Reviewers:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	
2 Select the **People/OBLIs** tab. The **HUD Reviewers** section displays information about HUD Reviewers by **Role, Staff Member Name, Office, and Email.** 	

C13. Grantee | Manage Tasks

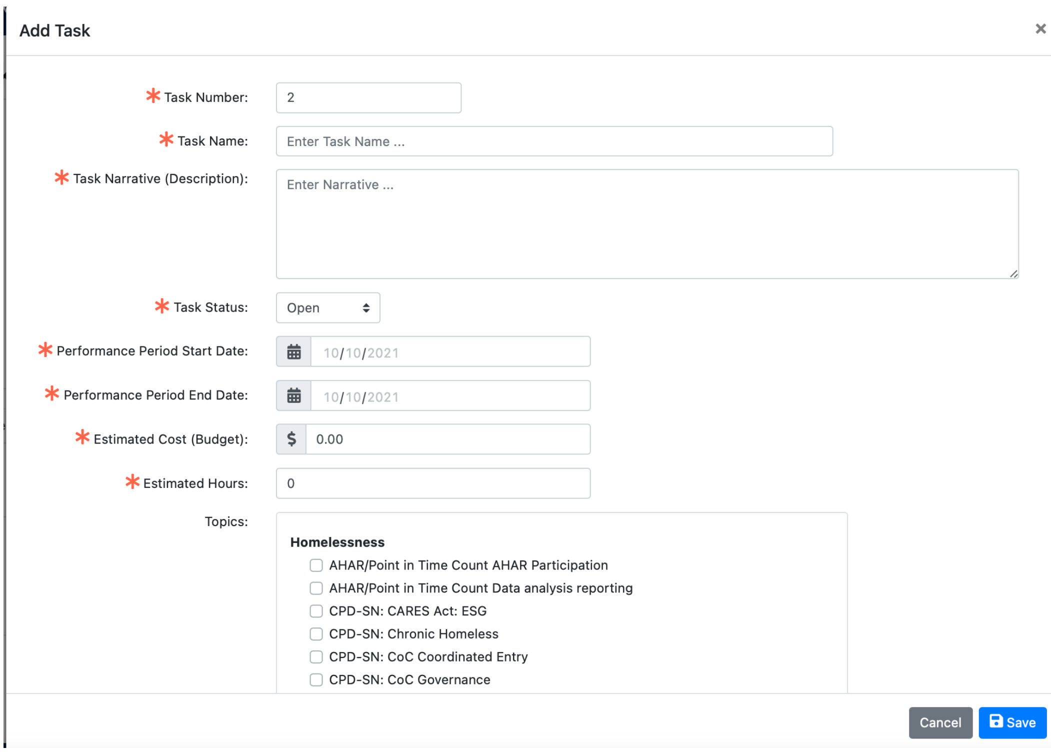
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to add, edit, and delete Work Plan tasks.	
Complete the following steps to add, edit, and delete Work Plan tasks:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	

User Role: Grantee User	**Menu Option:** Manage Work Plans

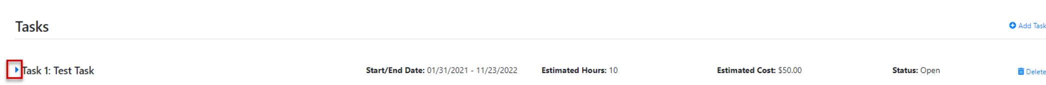
2 Select the **Tasks** tab. Then, select <**Add Task**> to open the **"Add Task"** page.



3 To add a new task for the Work Plan, enter Task Number, Task Name, Task Narrative (Description), Task Status, Performance Period Start Date, Performance Period End Date, Estimated Cost (Budget), Estimated Hours, and Topics. Then, select <**Save**> to save the task.

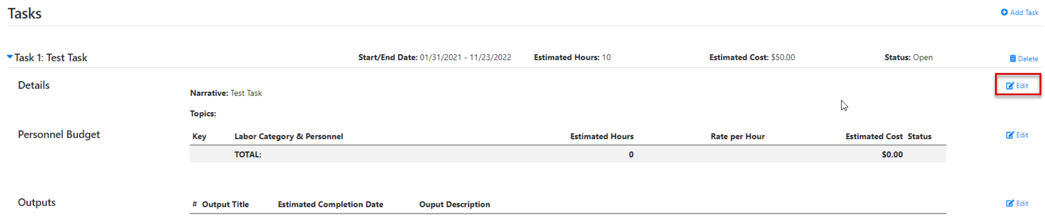


4 The task is then displayed on the **Tasks** tab. Select the Expand icon next to the Task Name to show the task details, personnel budget, and outputs sections.

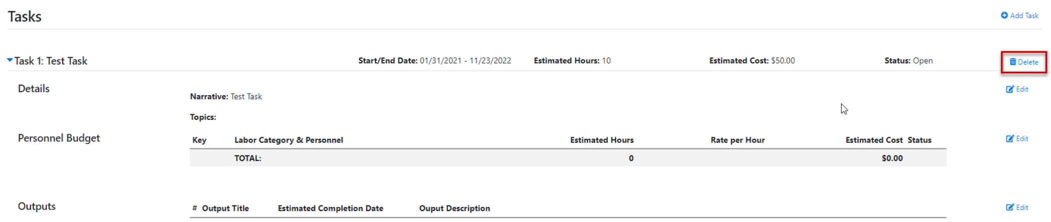


5 Select <**Edit**> to edit the Task Name, Task Narrative (Description), Task Status, Performance Period Start Date, Performance Period End Date, Estimated Cost (Budget), Estimated Hours, and Topics.

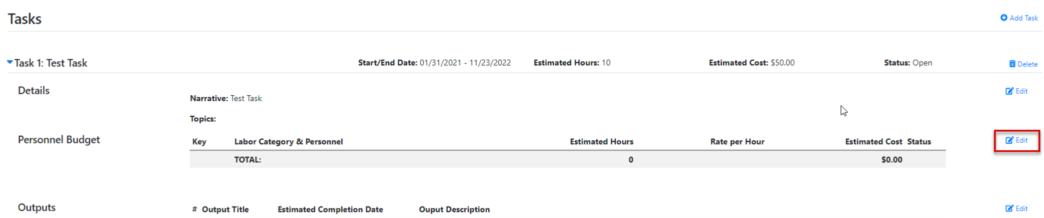
User Role: Grantee User	**Menu Option:** Manage Work Plans



6 If the task has never been approved, users may delete the task by selecting <**Delete.**>

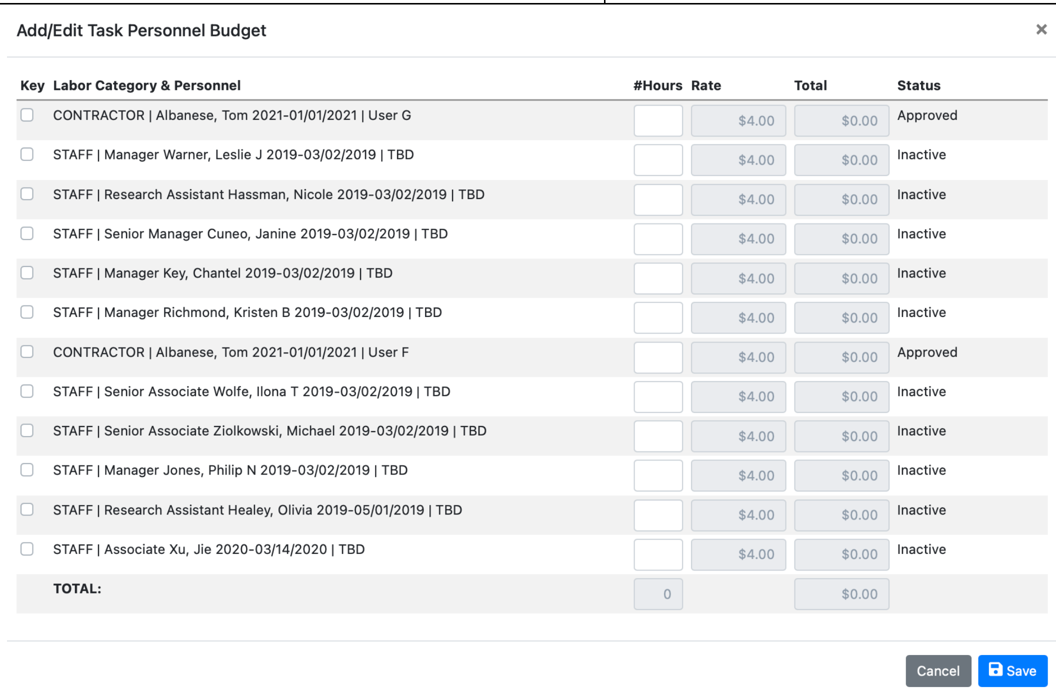


5 Selecting <**Edit>** in **Personnel Budget** section displays the "**Add/Edit Task Personnel Budget"** window. TA providers can select key personnel and specify number of hours allocated to everyone who will support the task.

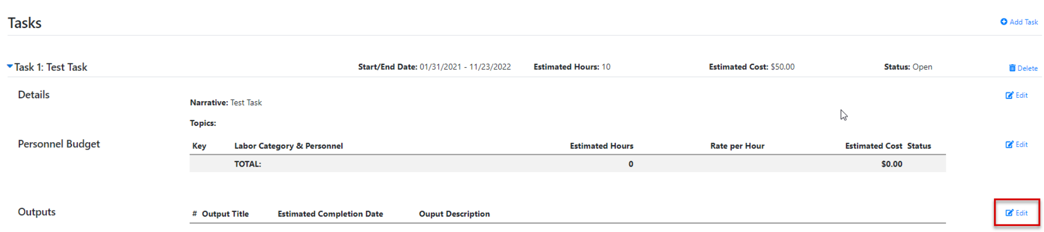


Select <**Save>** to update the task personnel for the current Work plan.

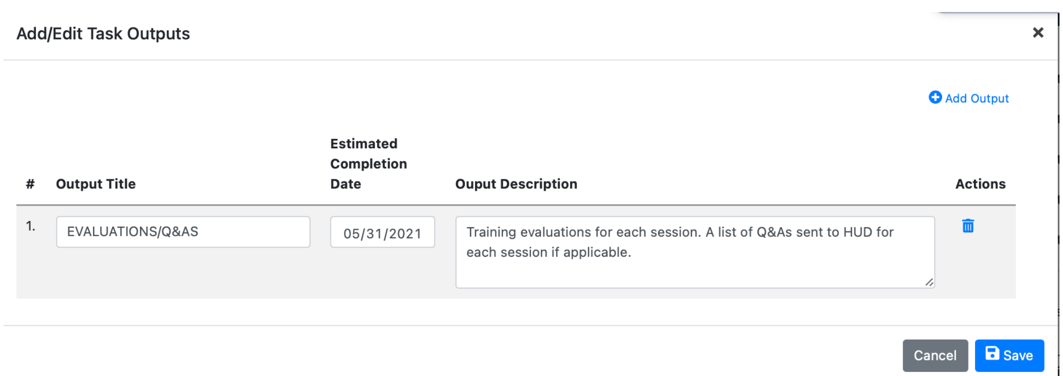
User Role: Grantee User	Menu Option: Manage Work Plans



6 Selecting the <**Edit**> link in the **Outputs** section opens the "**Add/Edit Task Outputs**" window. TA providers can add outputs to current Work Plan by specifying **Output Title, Estimated Completion Date, Output Description.**



Selecting <**Save**> allows TA providers to save the outputs to current Work Plan. Select the trash can icon to delete the output from current Work Plan.



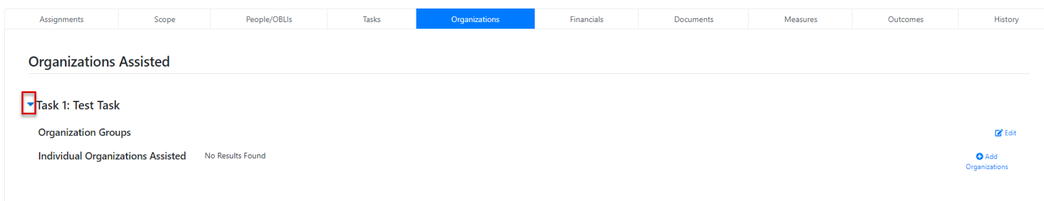
C14. Grantee | Associate Organization Groups

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to manage the list organization groups that will benefit from the Technical Assistance described by the Work Plans.	

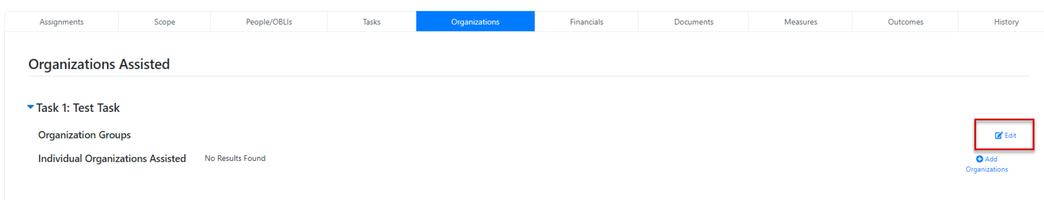
Complete the following steps to associate and manage organization groups:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

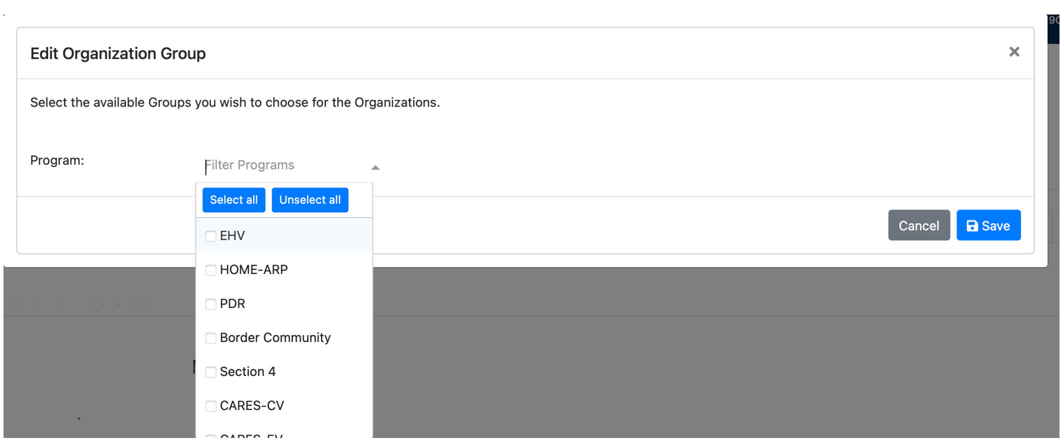
2 Select the **Organizations** tab. Then, select the Expand icon for the desired task. **NOTE**: All the tasks entered in the **Tasks** tab will be displayed here so TA providers can associate assisted organization groups and individual organizations.



3 Select <**Edit**> next to "Organization Groups" in the **Organization Assisted** section for the desired task to open the "**Edit Organization Group"** window.



3 Select the applicable organization groups and select **<Save>** to add them to current Work Plan.



<Select all> and <**Unselect all>** allows TA providers to select and unselect all organization groups respectively.

C15. Grantee | Associate Individual Organizations

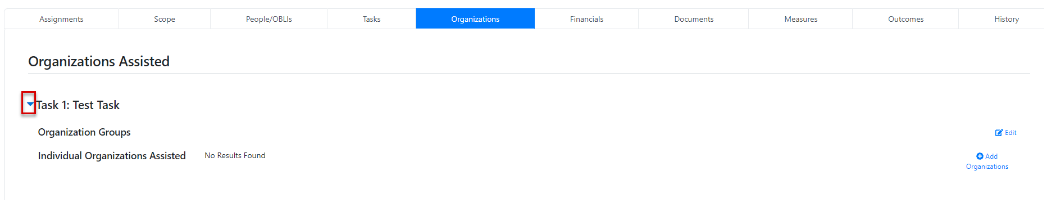
User Role: Grantee User	**Menu Option:** Manage Work Plans

Purpose: Allow TA Provider Users to manage the list organizations assisted by the Technical Assistance described by the Work Plan.

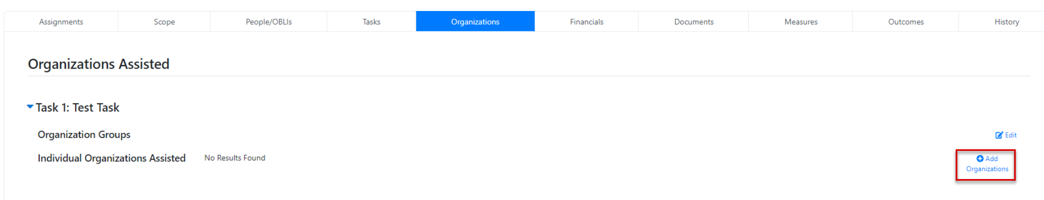
Complete the following steps to associate individual organizations:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 Select the **Organizations** tab. Then, select the Expand icon for the desired task. **NOTE**: All the tasks entered in **Tasks** tab will be displayed here so TA providers can associate assisted organization groups and individual organizations.



3 Selecting **<Add Organizations>** opens the "**Add Organization"** page.

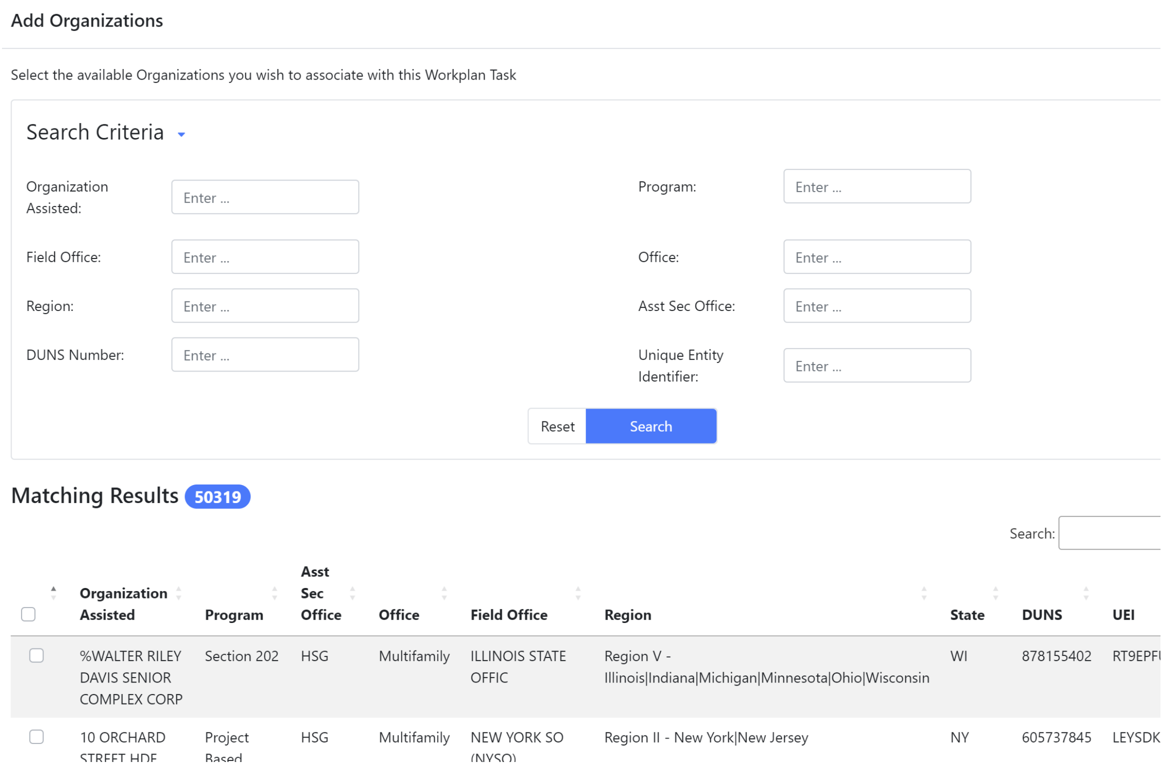


4 **The "Add Organizations"** page allows TA providers to search across all organizations using the following search criteria: **Organization Assisted, Program, Field Office, Office, Region, Asst. Sec Office**. Selecting <**Search>** displays matching results in the grid underneath.

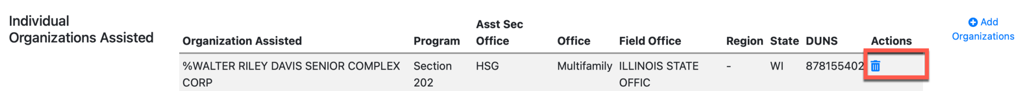
Results grid includes details like **Organization Assisted, Program, Asst Sec Office, Office, Field Office, Region, State, DUNS and Unique Entity Identifier.** Select applicable organizations and

User Role: Grantee User	**Menu Option:** Manage Work Plans

select <**Save**> to add organizations to current Work Plan.



5 Associated individual organizations are displayed under the **Organizations** tab in the **Individual Organizations Assisted** section in grid.



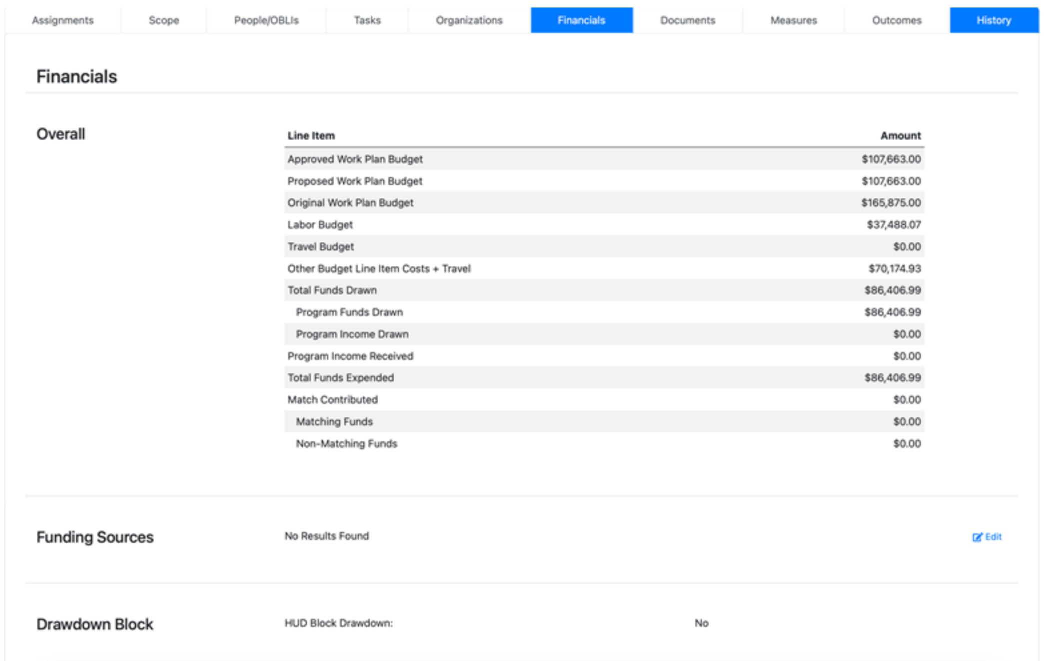
Selecting the trash can icon in the Actions column allows TA providers to delete the organization from current Work Plan task.

NOTE: TA providers can follow the steps provided in **C14 – Associate Organization Groups** section of this document to add Organization Groups and Organizations to all tasks under current Work Plan.

C16. Grantee | Manage Financials

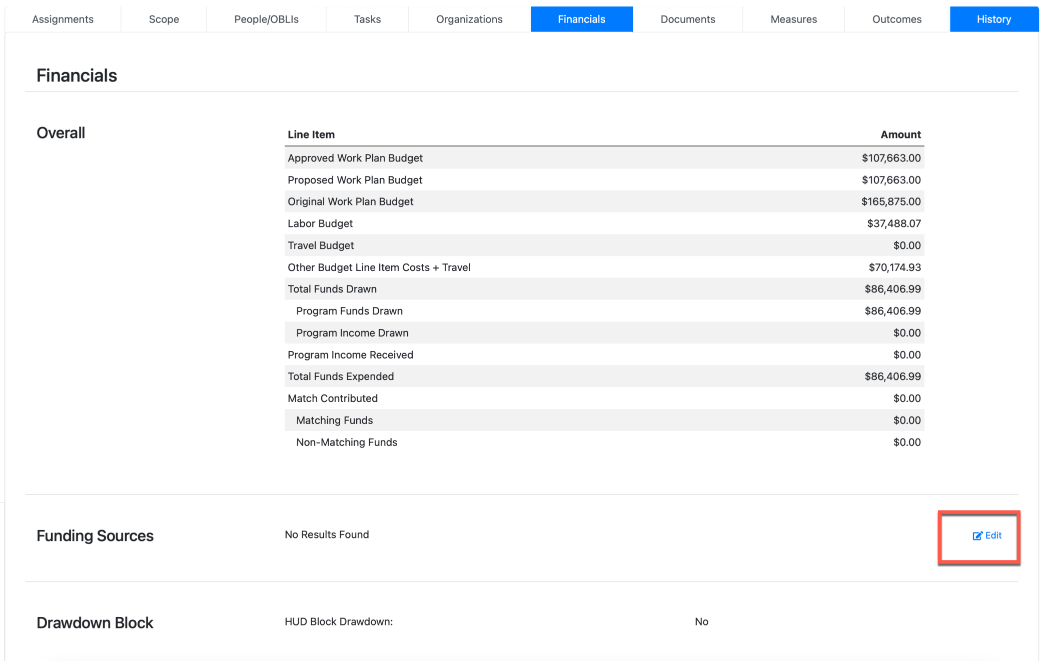
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to view Financials of a Work Plan.	
Complete the following steps to manage financials:	

User Role: Grantee User	**Menu Option:** Manage Work Plans
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.
2	Select the **Financials** tab. The **Overall** section allows TA providers to view all financial information for the current Work Plan.



User Role: Grantee User	**Menu Option:** Manage Work Plans

If one or more Funding Sources were specified in the grant's Action Plan, the amount allocated for the Work Plan from each funding source can be specified using the **<Edit>** link in the **Funding Sources** section.



3 **Drawdown Block** section allows TA providers to view when a block is set for current Work Plan by HUD users.

C17. Grantee | Manage Documents

User Role: Grantee User	**Menu Option:** Manage Work Plans

Purpose: Allow TA Provider Users to add documents to, view/download documents, or remove documents from a Work Plan.

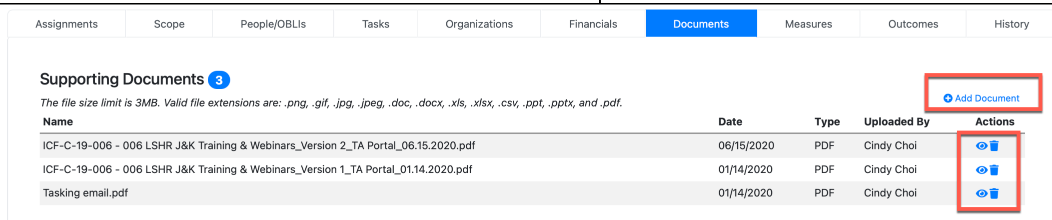
Complete the following steps to manage documents:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 The **Documents** tab allows TA providers to add any documents to current Work Plan. Selecting <**Add Document>** allows TA providers to add documents.

Note: The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

User Role: Grantee User	**Menu Option:** Manage Work Plans



3 Selecting the eye icon in the Actions column allows users to view supporting documents. Selecting the trash can icon in the Actions column allows users to delete the specified supporting document.

C18. Grantee | Manage Measures

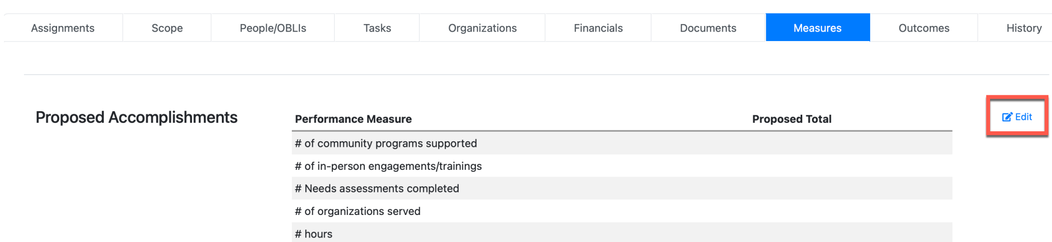
User Role: Grantee User	**Menu Option:** Manage Work Plans

Purpose: Allow TA Provider Users to add measures to a Work Plan.

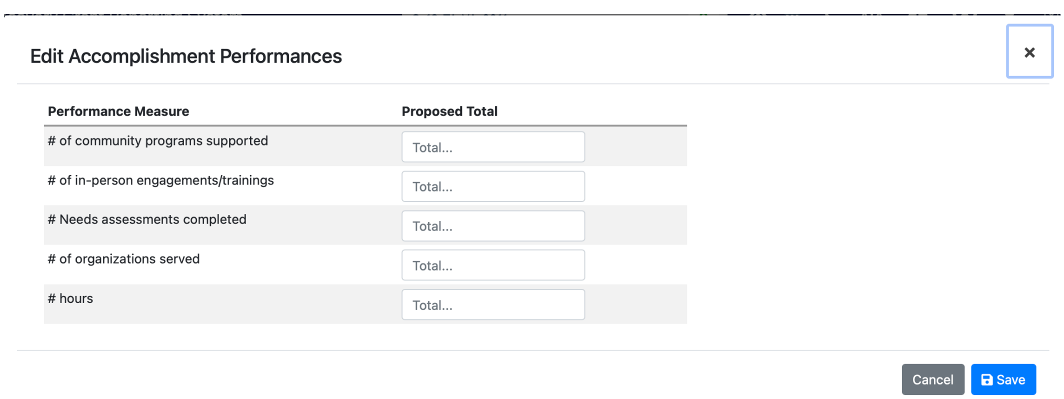
Complete the following steps to manage measures:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 The **Measures** tab allows TA providers to add proposed accomplishments to current Work Plan.



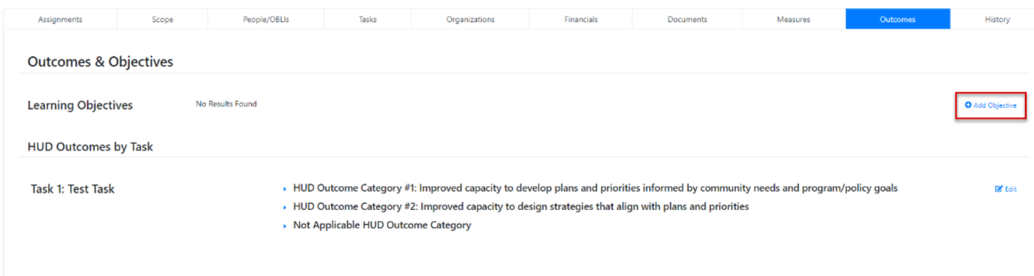
3 Selecting <**Edit**> opens the "**Edit Accomplishment Performances**" page allowing TA providers to specify performance measures.



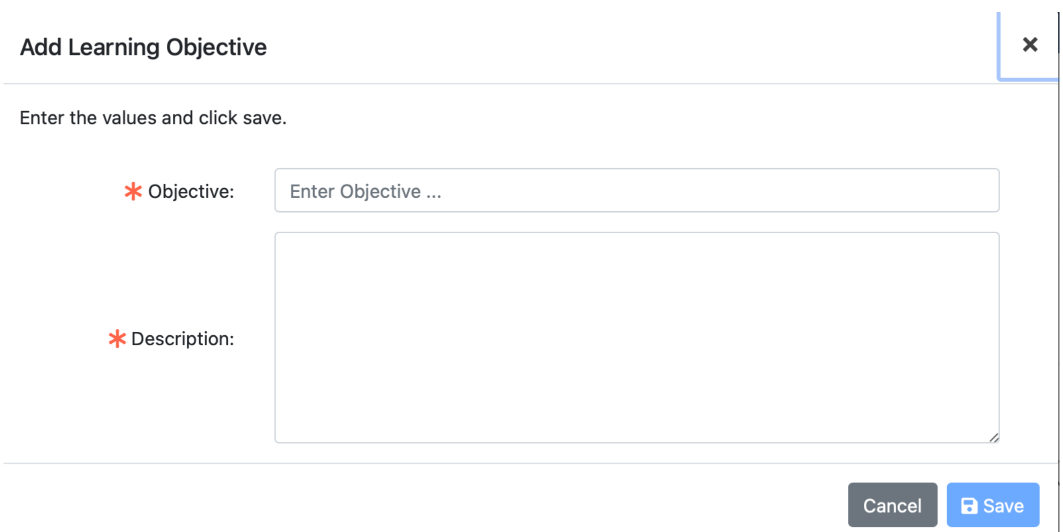
User Role: Grantee User	**Menu Option:** Manage Work Plans
Selecting <**Save**> saves the performance measures specified in the window and provides a success message.	

C19. Grantee | Manage Learning Objectives and Outcomes

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to manage outcomes and learning objectives for a Work Plan.	
Complete the following steps to manage learning objectives and outcomes:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	
2 Select the **Outcomes** tab. Then, select <**Add Objective**>.	

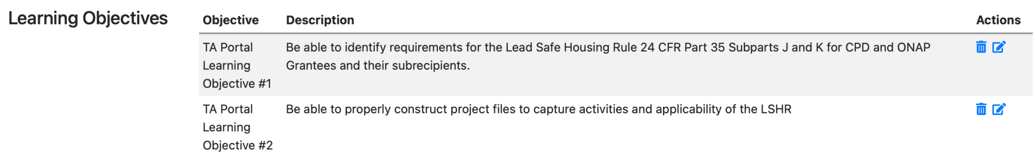


3 Selecting <**Add Objective**> allows TA providers to add an objective using the "**Add Learning Objective"** page.



TA providers can add an objective with description and select <**Save**> to add a learning objective to current Work Plan.

User Role: Grantee User	**Menu Option:** Manage Work Plans
4	The learning objectives are displayed in a grid. Selecting the pencil icon in the Actions column allows user to edit an existing learning objective. Selecting the trash can icon in the Actions column allows users to delete an existing learning objective.

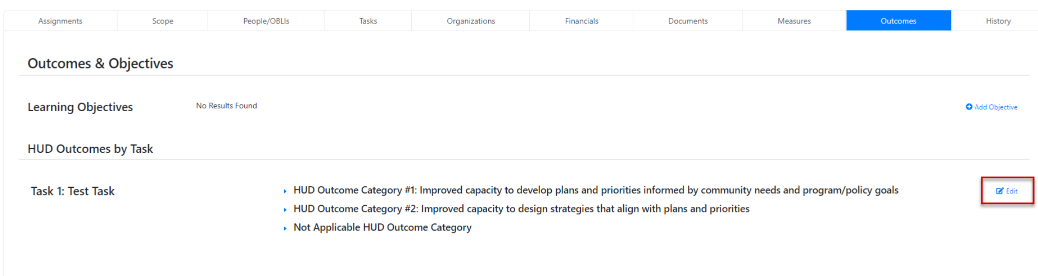


Learning Objectives

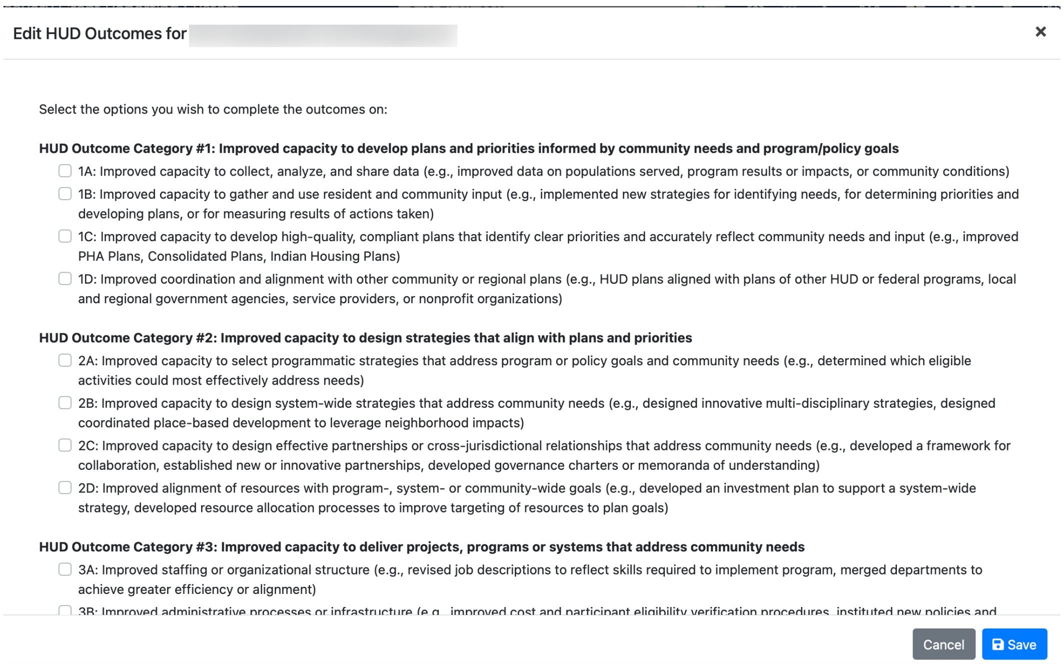
Objective	Description	Actions
TA Portal Learning Objective #1	Be able to identify requirements for the Lead Safe Housing Rule 24 CFR Part 35 Subparts J and K for CPD and ONAP Grantees and their subrecipients.	
TA Portal Learning Objective #2	Be able to properly construct project files to capture activities and applicability of the LSHR	

C20. Grantee | Manage Outcomes

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to manage outcomes for a Work Plan.	
Complete the following steps to manage outcomes:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.
2	Select the **Outcomes** tab. Then, in the **HUD Outcomes by Task** section, select <**Edit>** for the desired task. The "**Edit HUD Outcomes for <Task Name>"** page is displayed.

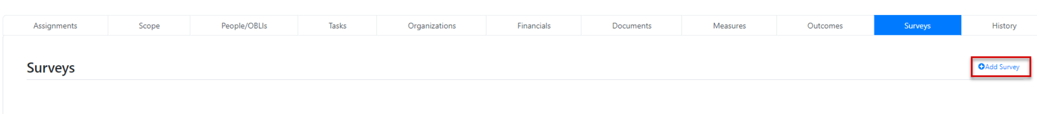


User Role: Grantee User	**Menu Option:** Manage Work Plans
3 Select the applicable outcomes and select **<Save>** to save HUD outcomes for the current Work Plan.	



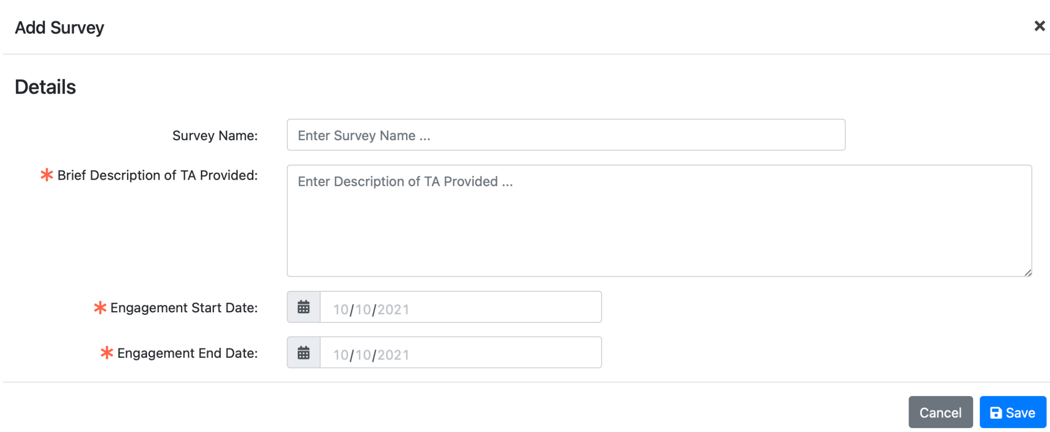
C21. Grantee | Manage Surveys

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider Users to add, edit, and delete surveys for a Work Plans.	
Complete the following steps to manage surveys:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	
2 Select the **Surveys** tab. Then, select **<Add Survey>** in the **Survey** section to open the "**Add Survey"** page. **Note**: Currently, the survey tab is only displayed for Direct TA Work Plans.	

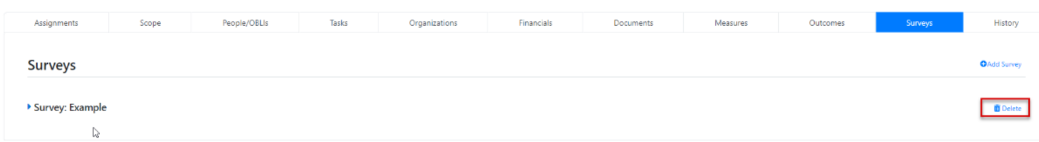


User Role: Grantee User	**Menu Option:** Manage Work Plans

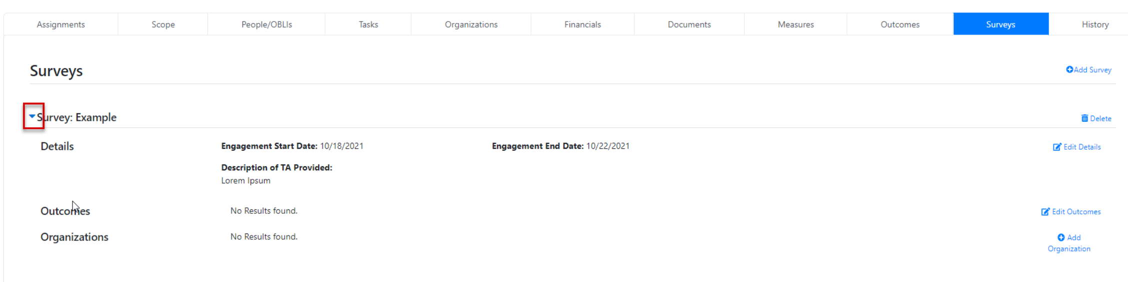
3 On the **"Add Survey"** page, TA providers can add Survey Name, Brief Description of TA Provided, Engagement Start Date, and Engagement End Date. Selecting <**Save**> saves the survey and provides a success message.



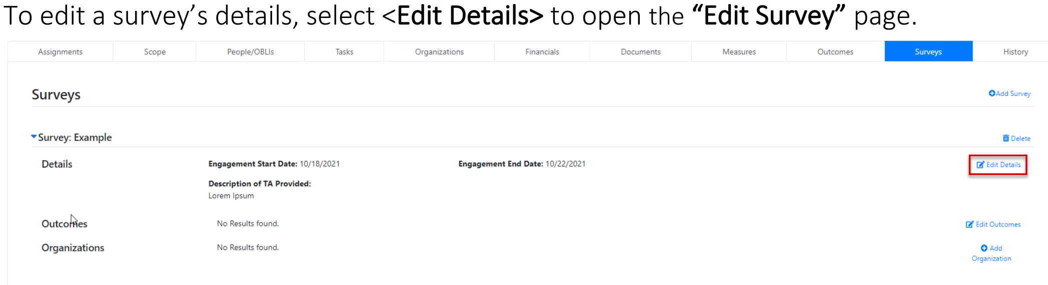
4 Selecting <**Delete**> allows users to delete a survey. **NOTE**: Surveys cannot be deleted after they have been distributed to recipients.



5 Select the Expand icon next to the survey title to display the survey Details, Outcomes, and Organizations sections.

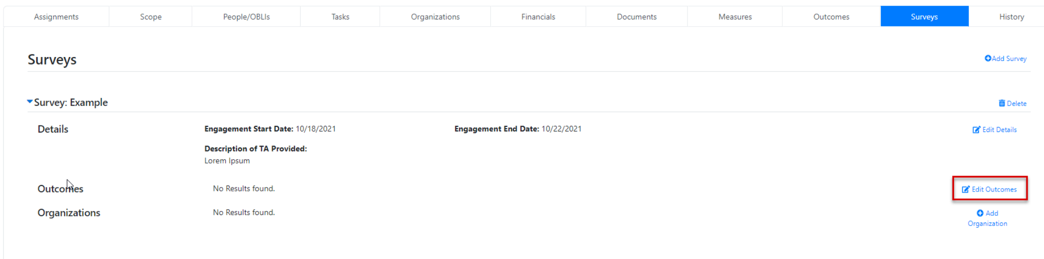


6 To edit a survey's details, select <**Edit Details**> to open the **"Edit Survey"** page.

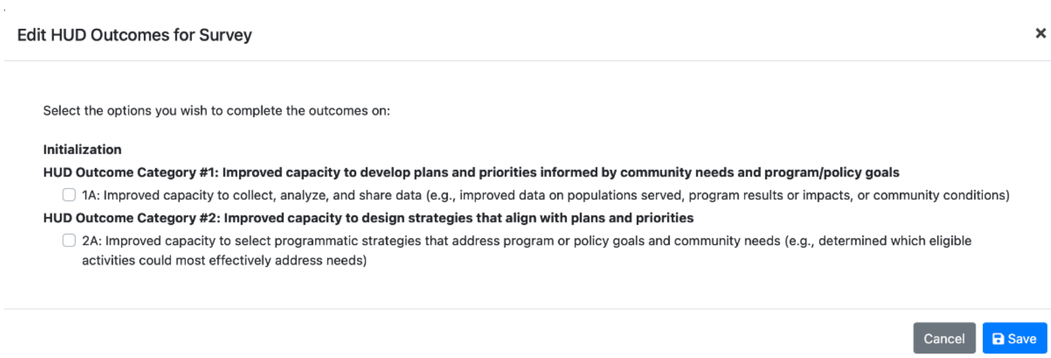


User Role: Grantee User	**Menu Option:** Manage Work Plans

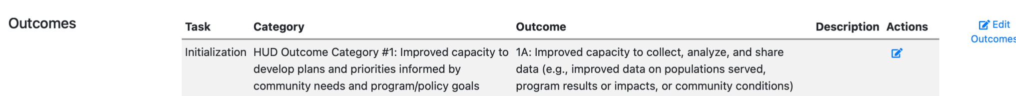
Selecting <**Edit Outcomes>** under the **Outcomes** section opens the **"Edit HUD Outcomes for Survey"** page.



Select the applicable outcomes. Then, select <**Save>** to save. **NOTE**: TA Providers only select from the outcomes specified on the **Outcomes** tab. If a desired outcome is missing, update the outcomes selected for the Work Plan on the Outcomes tab.



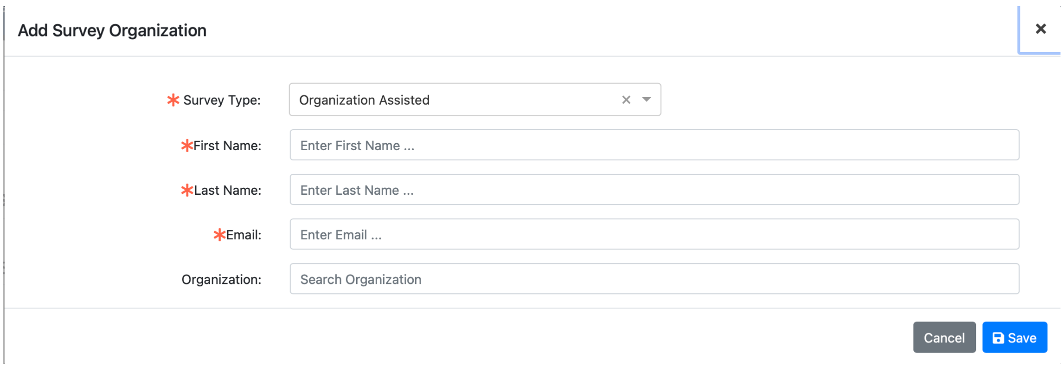
7 The task name, category, outcome, and outcome description are displayed in a grid in the Outcomes section on the **Surveys** tab once an outcome is selected for a survey. NOTE: The outcome description is prepopulated with the description provided for the task's outcome on the Outcomes tab.



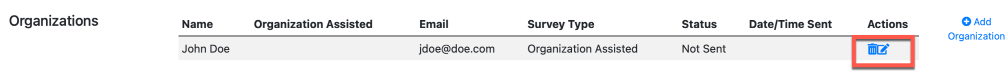
Selecting the pencil icon in the Actions column allows TA providers to edit Outcome Description for the selected survey only.

User Role: Grantee User	**Menu Option:** Manage Work Plans

8 Selecting <**Add Organization**> under the **Organizations** section opens up the "**Add Survey Organization"** page.

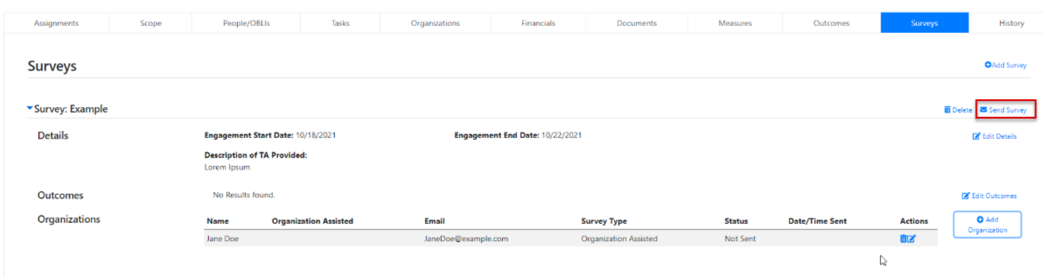


TA providers can provide Survey Type, First Name, Last Name, Email, Organization and select **<Save>** to add a survey organization. Once the survey organization is added, below information is displayed on the Surveys tab.

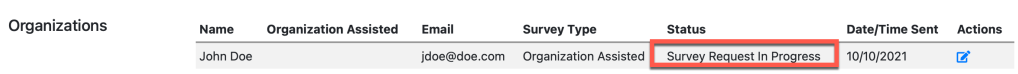


TA providers can use the pencil icon and trash can icon in the Actions column to edit and delete survey organizations respectively.

9 Users can select <**Send Survey>** button to send the survey for specified organization(s).



10 TA providers can view the status of the survey under **Organizations** section in the **Survey** tab.



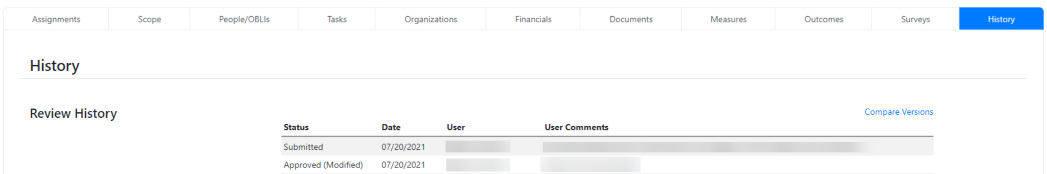
C22. Grantee and HUD | View History

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider and HUD users to view history of a Work Plan.	

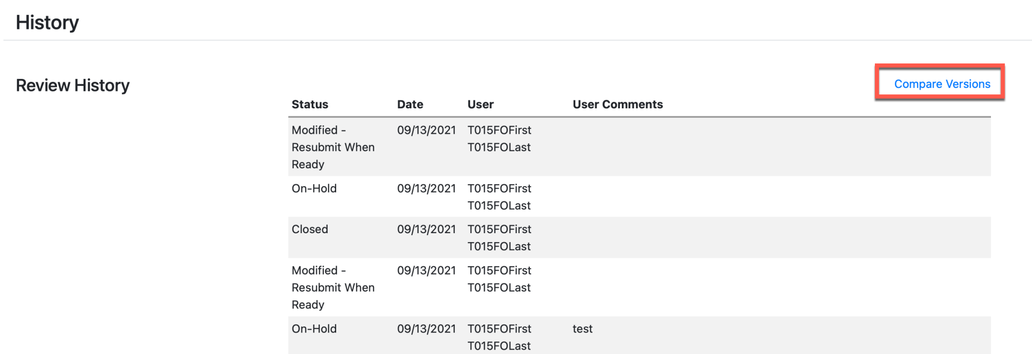
Complete the following steps to view history of a Work Plan:

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 Select the **History** tab.



3 The **History** tab includes a section for **Review History**. The grid contains Status, Date, User, User Comments. TA providers can also review the differences between two versions of a Work Plan by selecting <**Compare Versions>** and then selecting the two versions that should be compared.



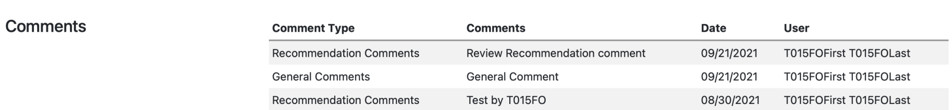
History

Review History

Compare Versions

Status	Date	User	User Comments
Modified - Resubmit When Ready	09/13/2021	T015FOFirst T015FOLast	
On-Hold	09/13/2021	T015FOFirst T015FOLast	
Closed	09/13/2021	T015FOFirst T015FOLast	
Modified - Resubmit When Ready	09/13/2021	T015FOFirst T015FOLast	
On-Hold	09/13/2021	T015FOFirst T015FOLast	test

4 The **History** tab includes a section for **Comments.** TA providers can view both **Review Recommendation Comments** as well as **General Comments** along with Date and User information of who added the comments.



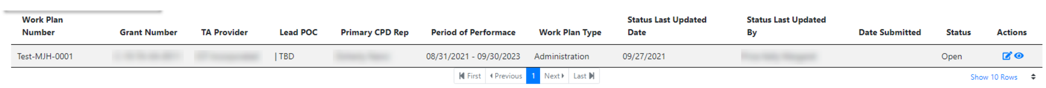
Comments

Comment Type	Comments	Date	User
Recommendation Comments	Review Recommendation comment	09/21/2021	T015FOFirst T015FOLast
General Comments	General Comment	09/21/2021	T015FOFirst T015FOLast
Recommendation Comments	Test by T015FO	08/30/2021	T015FOFirst T015FOLast

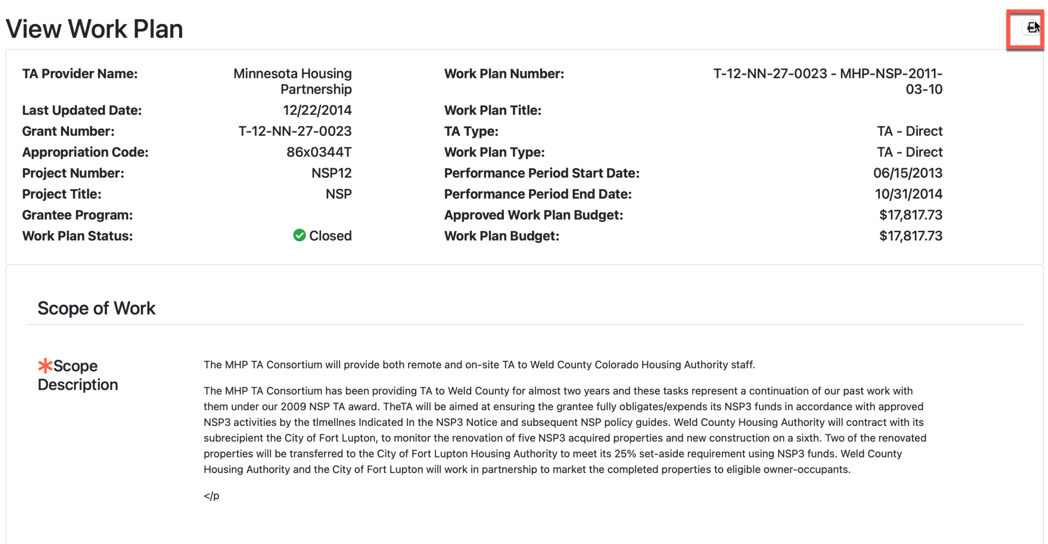
D. Grantee and HUD | View Work Plan

User Role: Grantee and HUD User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Providers and HUD users to view a Work Plans.	
Complete the following steps to view a Work Plan:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	

2 Selecting the icon in Actions column will open the "**View Work Plan**" page.



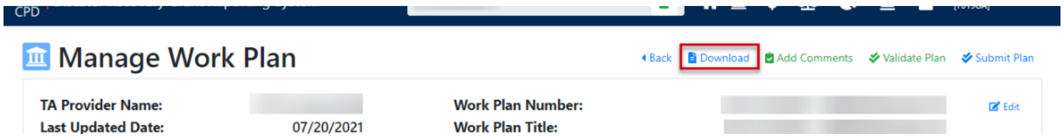
Scroll down the page to view all the information related to this Work Plan. Select the printer icon at the top right corner of the page to print the Work Plan.



E. Grantee and HUD | Download Work Plan

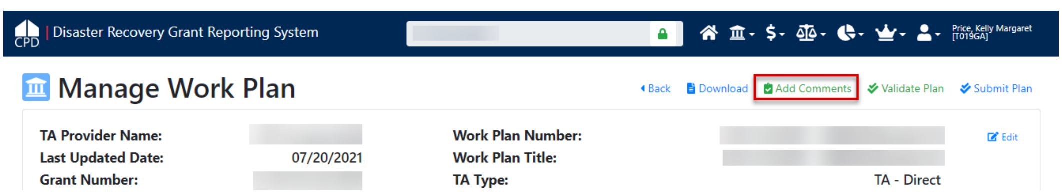
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider and HUD users to download a Work Plan.	
Complete the following steps to download a Work Plan:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	

User Role: Grantee User	Menu Option: Manage Work Plans
2 Select **<Download>** in the secondary navigation menu on the **"Manage Work Plan"** page to download the Work Plan in a PDF format.	

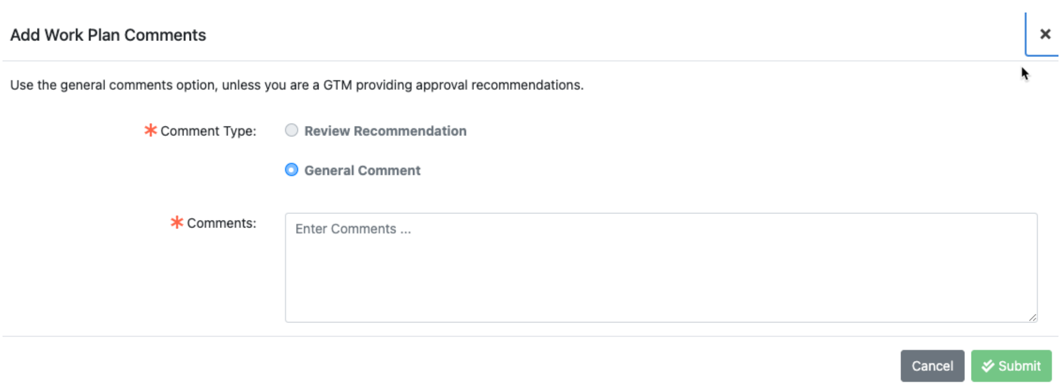


F. Grantee and HUD | Add Comments to Work Plan

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider and HUD users to add comments to a Work Plan.	
Complete the following steps to add comment to a Work Plan:	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.	
2 Select **<Add Comments>** on the "**Manage Work Plan"** page.	



The "**Add Work Plan Comments"** page will open. **Note**: TA providers can only add General Comments. HUD users can add Review Recommendations as well as General Comments.

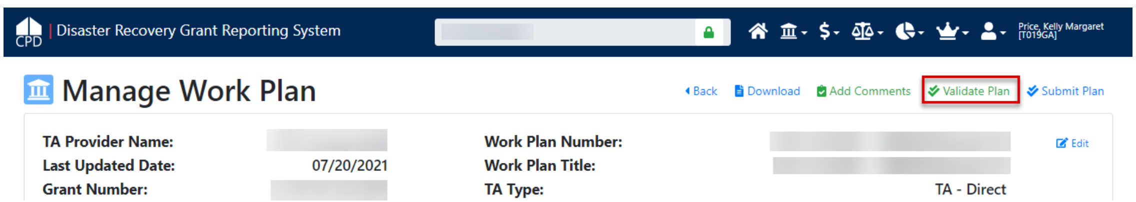


G. Grantee and HUD | Validate Work Plan

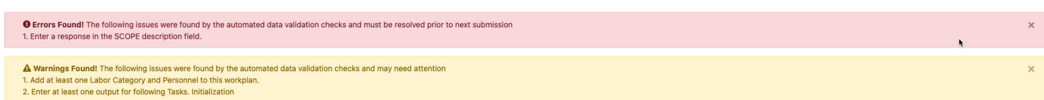
User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Provider and HUD users to validate a Work Plans.	
Complete the following steps to validate a Work Plan:	

1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 Select **<Validate Plan>** in the secondary navigation menu on "**Manage Work Plan"** page to validate the Work Plan.



A list of data validation warnings and errors will be displayed. Data validation warnings indicate that are data or sections of the Work Plan that may need updates. Data validation errors indicate that there are data in the Work Plan that must be amended before the Work Plan can be submitted to HUD for review.

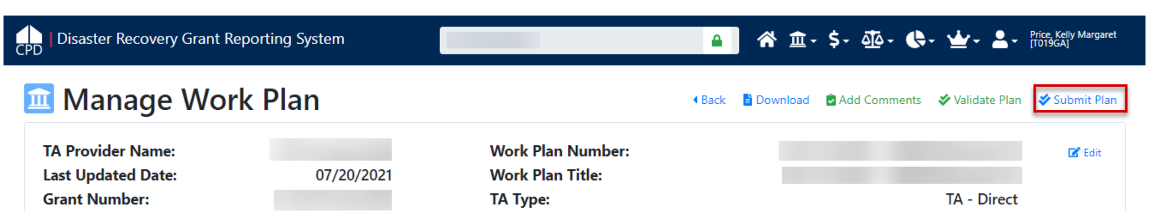


H. Grantee | Submit Work Plan

User Role: Grantee User	**Menu Option:** Manage Work Plans
Purpose: Allow TA Providers to submit a Work Plan.	
Complete the following steps to submit a Work Plan:	

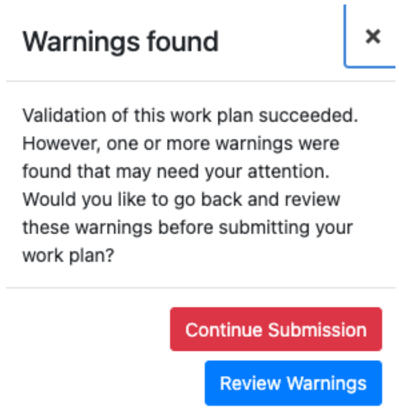
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the **"Manage Work Plan"** page.

2 Select **<Submit Plan>** in the secondary navigation menu on the "**Manage Work Plan"** page to submit the Work Plan.



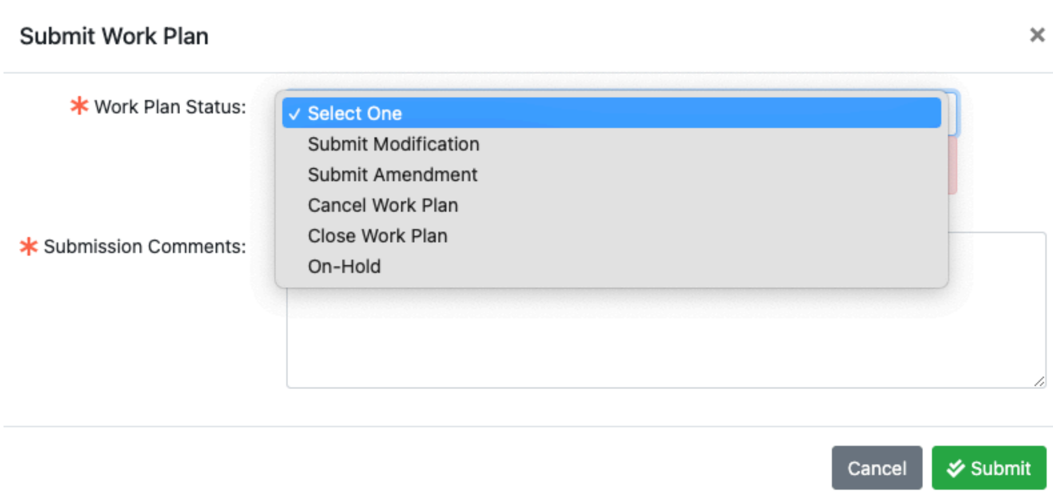
User Role: Grantee User	**Menu Option:** Manage Work Plans

NOTE: TA Providers must resolve all the errors prior to submitting the Work Plan. An alert is displayed prior to submission when warnings are found. TA Providers can review the warnings and proceed accordingly.



4 TA Providers will have the option to submit the Work Plan using following options: Submit Modification, Submit Amendment.

Users can also use this window to "Cancel Work Plan," "Close Work Plan," or place the Work Plan "On-Hold."



The System sends an email to the CPD Rep and the Work Plan creator upon submitting the Work Plan.

I. Upload Work Plan Data

Grantee Users of TA Providers organizations can add, edit, cancel, and close Work Plans using HUD's Data Upload templates. These templates allow users to upload information in batches for efficiency. For information on how to use the data upload function, see Chapter 34 of this User Manual.