

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

Chapt	er 17: Technical Assistance Work Plans   Manage My Grants Module
Chapt	er 17: Technical Assistance Work Plans1
Α.	Manage My Grants Module Access1
	A1. Grantee   User Access
В.	Add Work Plans2
	B1. Grantee   Add Work Plan2
C.	Manage Work Plans2
	C1. Grantee   Manage Work Plans2
	C2. Grantee   Edit Work Plan Details
	C3. Grantee   Associate Assignments7
	C4. Grantee   Associate Work Plans
	C5. Grantee   Edit Scope Description
	C6. Grantee   Edit Strategic Goals
	C7. Grantee   Manage Proposed Milestones
	C8. Grantee   Edit Travel Budget14
	C9. Grantee   Manage Other Budget Line Item Costs and Travel15
	C10. Grantee   Edit Labor Budget16
	C11. Grantee   Manage Proposed Personnel17
	C12. Grantee   View HUD Reviewers
	C13. Grantee   Manage Tasks
	C14. Grantee   Associate Organization Groups23
	C15. Grantee   Associate Individual Organizations
	C16. Grantee   Manage Financials25
	C17. Grantee   Manage Documents
	C18. Grantee   Manage Measures
	C19. Grantee   Manage Learning Objectives and Outcomes29
	C20. Grantee   Manage Outcomes
	C21. Grantee   Manage Surveys
	C22. Grantee and HUD   View History
D.	Grantee and HUD   View Work Plan
Ε.	Grantee and HUD   Download Work Plan
F.	Grantee and HUD   Add Comments to Work Plan



G.	Grantee and HUD   Validate Work Plan	38
н.	Grantee   Submit Work Plan	38
Ι.	Upload Work Plan Data	39



### 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
<b>Q</b> Manage Work Plans	С	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

Us	<b>er Role:</b> Grantee Use	er		Menu Option: 🏦	Manage My Gr	ants Module
Pu	rpose: Allow TA Pro	viders to access Wo	ork Plan actions.			
2	Complete the foll	lowing steps to acc	ess the Manage M	y Grants Module:		
1	In the DRGR Systen	n, select the <b>Mana</b> g	<b>ge My Grants</b> modu	lle, or $\hat{\mathbf{m}}$ icon, locat	ted in the naviga	ation menu.
		B-11-DN	-13-0001	斧 血- \$- 亞-	<b></b>	, Glen AJ
2	This opens the drop Plan functions unde	odown menu items er the Work Plan m nts	for the <b>Manage M</b> enu, as highlighteo	<b>y Grants</b> module. Th I in the screenshot.	ne DRGR System	າ displays Work
	ACTION PLANS	PROJECTS	GRANTEE PROGRAMS	PERFORMANCE REPORTS	GRANTS	WORK PLANS
	Manage Action Plan	<ul> <li>View Projects/Activities</li> </ul>	Add Grantee Program	Manage Performance Report	Closeout Grant	Q Manage Requests
	View Action Plan	Download Projects/Activities	<b>Q</b> Search Grantee Programs	Q Search Performance Reports	View Grant	Q Manage Assignments
	<ul> <li>Download Action Plan</li> <li>Q Search Action Plans</li> <li>Q Lookup Consolidated Plans</li> </ul>	🔍 Search Projects 🛛 🖤		Manage Addresses	Search Grants 🖤	Add Work Plan      Manage Work Plan      Upload Work Plan



#### 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

<b>ser Role:</b> Grantee U	ser		Menu Option: 🗗 A	dd Work Plan	
<b>rpose:</b> Allow TA Pr	oviders to add a DR	GR Work Plan.			
Complete the f	ollowing steps to ad	d a DRGR Work Pl	an:		
Navigate to the <b>I</b>	Manage My Grants	module, or 🏦 ico	on. Locate the <b>Actic</b>	on Plan menu a	as described ir
Section AI above.	Select <add p<="" th="" work=""><th>Plan&gt;. The "Add TA</th><th>Work Plan" page w</th><th>ill load.</th><th></th></add>	Plan>. The "Add TA	Work Plan" page w	ill load.	
Manage My Gra  ACTION PLANS  Manage Action Plan  View Action Plan  Source Action Plan  Consolidated Plans  Consolidated Plans	PROJECTS	GRANTEE PROGRAMS	PERFORMANCE REPORTS Manage Performance Report Search Performance Reports	GRANTS ■ Closeout Grant ④ View Grant Q Search Grants ④	WORK PLANS Q. Manage Requests Q. Manage Assignments C. Add Work Plan Q. Manage Work Plans L. Uploed Work Plan
After specifying r selecting <b><save></save></b> <b>Plan"</b> page is disp successfully" mes	equested informati on the <b>"Add Work P</b> played. The "New TA sage appears at the	on marked with a ' <b>lan"</b> page, the <b>"M</b> A Work Plan has b top of the page.	asterisks and anage Work een created dia th	P: If the DRGR S splays errors, b at:	System e sure
The <b>"Manage Wo</b> Last Updated Da Number, Project Plan Number, M Performance Per Approved Work P	rk Plan" page head te, Grant Number, Title, Grantee Prog Nork Plan Title, iod Start Date, Pe lan Budget, and Pro	er includes TA Pro Appropriation Co ram, Work Plan S TA Type, Work rformance Perioc posed Work Plan	vider Name, ode, Project status, Work Plan Type, End Date, Budget.	all mandator complete; an sufficient fun available to s work plan bu	y fields are nd nds are support the ndget.
Following tabs are Organizations, Fir	e available on the " <b>f</b> nancials. Documents	Manage Work Plar Measures, Outco	" page: Assignment omes. and History.	s, Scope, Peopl	e/OBLIs, Tasks



Add Work Plan						
Details						
⊁ Grant Number:			¢			
<b>*</b> TA Provider:	ICF Incorporated					
* Project:	Select One		\$			
Grantee Program:			\$			
⊁ Work Plan Number:	Enter Work Plan N	lumber				
★ Work Plan Title:	Enter Work Plan Ti	itle				
⊁ Work Plan (Activity) Type:	Select One		•			
* TA Type (Activity Category):	Activity Category .					
* Performance Period Start Date:	mm/dd/yyyy					
* Performance Period End Date:	mm/dd/yyyy					
					Cance	el 🖬 Sav
🟛 Manage Work Pla	n	(	Back     Back	Add Comments	🞸 Validate Plan	🛠 Submit P
TA Provider Name: Last Updated Date: Grant Number:	06/29/2021	Work Plan Number: Work Plan Title: TA Type:			WP-015 WP Title PFS-Capacity	🗹 Edit
Appropriation Code: Project Number: Ac Project Title: CPD, Hor	Iministration using, Public Housing, CC	Work Plan Type: Peformance Period St Peformance Period Er	art Date: nd Date:	PFS - Capaci	ity assessment 01/02/2020 01/02/2020	
Grantee Program: Work Plan Status:	Z Open	Approved Work Plan E Proposed Work Plan E	Budget: Budget:			



Tabs to Complete Work Plan

Tab	Notes
Assignments	The System allows TA Provider to associate assignments and other work plans.
	Assignments Scope People/OBLIs Tasks Organizations Financials Documents Measures Outcomes History
	Associated Assignments No Assignments found
	Associated Work Plans No Work Plans found
Scope	The System allows TA Provider to add Scope, Strategic Goals, Proposed
	Milestones.
	Assignments Scope People/OBLIs Tasks Organizations Financials Documents Measures Outcomes History Scope of Work
	*Scope Z fait Description
	Strategic Goals No Results Found
	Proposed No Results Found O Add Milestones
People/OBLIs	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.
	Assignments Scope People/OBLIs Tasks Organizations Financials Documents Measures Outcomes History
	People/Other Budget Line Items
	Travel Budget: \$0.00
	Other Budget <u>Budget Line Item Trip Associated Tasks Description Start Date End Date Amount Actions     Cost     Line Item Costs +     Travel     O </u>
	Labor Budget *Labor Budget: \$1.00
	Proposed Personnel
	HUD Reviewers     Role     Staff Member Name     Office     Office     Email      GTM     Office of Special Needs Assistance Programs     GTM     Office of Rural Housing and Economic Development



Tasks	The System allows this tab.	s TA Provider to add tasks and related information from
	Assignments Scope Peop	Digenizations Financials Documents Measures Ductomes History
	Tasks	O Aut the
	Add Task	×
	<b>≭</b> Task Number:	1
	★ Task Name:	Enter Task Name
	* Task Narrative (Description):	Enter Narrative
	★ Task Status:	Open •
	* Performance Period Start Date:	a mm/dd/yyyy
	* Performance Period End Date:	mm/dd/yyyy
	* Estimated Cost (Budget):	\$ 0.00
	Topics:	
		Energy and Environment CC: Benchmarking and utility data analysis CC: Better Buildings Challenge (BBC) CC: Energy efficiency and high-performance building retrofits for assisted housing
		properties CC: Environmental Reviews for the National Environmental Policy Act (NEPA) and related federal environmental laws and authorities CC: Lead Hazard Control and Healthy Homes CC: Reveal Control and Healthy Homes CC: Reveale Ferrory
		Cancel 🔒 Save
	TA Providers can arrow to complete Task 4: initialization Details Nerrative Personnel Budget Key Labor Ca Outputs a output Title	expand the task after it is created by clicking the blue e information for Details, Personnel, and Outputs.
Organizations	The System allows	s TA Provider to add Organization Groups and Individual
	Organizations Ass	isted for each task from this tab.
	Assignments Scope Peop	Na(OBLia Taska Organizations Financials Documents Measures Outcomes History
	Organizations Assisted	
	<ul> <li>Initialization</li> </ul>	
	Organization Groups Individual Organizations Assisted No Renuts Four	d Gat O Adi Ogeneration
Financials	The System provid	des Overall Financials in this tab.



	Assignments Scope	People/OBLIs Tasks Organizations Financials Doce	aments Measures Outcomes History
	Financials		
	Queroll	No. No.	
	Overall	Line Rem	Amount
		Proposed Work Plan Budget	\$0.00
		Original Work Plan Budget	\$0.00
		Labor Budget	\$100
		over budget Other Budget Line Item Costs + Travel	\$0.00 \$0.00
		Total Funds Drawn	\$0.00
		Program Funds Drawn	\$0.00
		Program Income Drawn	\$0.00
		Total Funds Expanded	\$0.00
		Match Contributed	\$0.00
		Matching Funds	\$0.00
		Non-Matching Funds	\$0.00
Documents	The System allo	ws TA Provider to add supporting	g documents from this tab.
	The file size limit is 348. Valid file extensions are:_ong,	of, by you, doe, doe, no, no, cor, got, gate, and got.	
Measures	The System allo this tab.	Pregacitita Tasks Organizations Prancials Document	ted accomplishments from
	Proposed Accomplishments	Performance Measure	Proposed Total IZ Edit
		# of Plans Reviewed	
		# of community engagement meetings/events # of community programs supported	
		# of Plans Completed	
		# of in-person engagements/trainings	
		# Needs assessments completed	
		e or mans or manning moducts # of organizations served	
		# of new community pertnerships developed	
		# hours	
		Ø of engagements/ trainings offered	
Outcomes	The System allo tab.	Prepapolities TA Provider to add Outcomes	s & Objectives from this
	Initialization	No Cultomes Selected.	62 tak
Survey	Where applicable	the System allows users to set up	surveys from this tab
Juivey		, the system allows users to set up	surveys nom this tab.
	Assignments Scope P	eople/OBLIs Tasks Organizations Financials Documents	Measures Outcomes Surveys History
	Surveys		OAdd Survey
History	TA Providers ca	n view the History of the Work P	lan and compare previous
	versions using t	his tab.	
	Assignments Scope	People/ORLIs Tasks Organizations Financials Documents	Measures Outcomes Hattory
	History		
	Review History	No Results Found	Company Versions
	Comments	No Results Found	



#### 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 Us	ser		Menu Option: Q N	1anage Work Pl	ans
Purpose: Allow TA Pr	ovider Users to mai	nage a DRGR Work	c Plan.		
Complete the fo	ollowing steps to ad	ld a DRGR Work Pl	an:		
<ol> <li>Navigate to the M A1 above. Select </li> <li>Manage My Gra</li> <li>Manage Action Plan</li> <li>View Action Plan</li> <li>Download Action Plan</li> <li>Search Action Plan</li> <li>Lookup Consolidated Plans#</li> </ol>	Anage My Grants m Manage Work Plan Ants PROJECTS View Projects/Activities Download Projects/Activities Search Projects ©	odule or micon. Le ns>. The "Manage of GRANTEE PROGRAMS Add Grantee Program Q Search Grantee Programs	Decate the Action Plan Work Plans" page w PERFORMANCE REPORTS Manage Performance Report Search Performance Reports Manage Addresses	n menu as descr ill load. GRANTS Closeout Grant View Grant Q. Search Grants	VORK PLANS Q Manage Requests Q Manage Assignments Add Work Plan Q Manage Work Plans L Upload Work Plan
2 TA Providers can s Provider, Primary Office Reviewer, a <b>More Criteria&gt;</b> .	search for Work Pla CPD Representative and Organization As	ns using following e, Lead POC, Assign ssisted. Additional	criteria: Work Plan I ment ID, Work Plan search criteria are r	Number, Work Type, Grant Nu revealed by clic	Plan Status, TA mber, Program king on <b><show< b=""></show<></b>



<b>Role:</b> Grante	e User		Menu Op	otion: <b>Q</b> Manage Worl	k Plans
Disaster Recovery Gra	ant Reporting System		Z-21-TA-VA-0011	<u>▲</u> 斧 ፹- \$- 亞-	
Search Criteria 🗸					Show Less Criteria
Work Plan Number:	Enter Work Plan Number		Assignment ID:	Enter Assignment Id	
Work Plan Status:	Select Option	~	Work Plan Type:	Select Option	~
TA Provider:	ICF Incorporated	~	Grant Number:	Z-21-TA-VA-0011	
Primary CPD Representative:	Enter Name		Program Office Reviewer:	Enter Name	
Lead POC:	Enter Lead POC		Organization Assisted:	Enter Organization Assisted	
Program:	Enter Program Name		Project Number:	Enter Project Number	
Project Title:	Enter Project Title		Organization Assisted State:	Select Option	~
Period of Performance From:	mm/dd/yyyy	=	Period of Performance To:	mm/dd/yyyy	=
Organization Assisted HUD Region:	Enter Region Office Name	~	Field Office:	Enter Field Office Name	
Survey Name:	Enter Survey Name		Supporting Document Name:	Enter Supporting Document Name	
Supporting Document Type:	Enter Supporting Document Type				
		Rese	Search		

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.

Сору												
Work Pla Number	an	Grant Numb	er	TA Provider	Primary CPD Rep	Period of Performace	Work Plan Type	Status Last Updated Date	Status Last Updated By	Date Submitted	Status	Actio
					T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	2
					T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	C (
					T047F0Last T047F0First	09/15/2021 - 12/31/2021		02/06/2022	T047FOLast T047FOFirst	02/03/2022	Approved	ß
					T047FOLast T047FOFirst	10/04/2021 - 09/30/2022		10/14/2021	T012FOLast T012FOFirst	10/07/2021	Approved	2
					T047FOLast	10/05/2021 -		nd 10/14/2021	T012FOLast	10/07/2021	Approved	20
ckinį	g on <b>lana</b>	the	<ed< th=""><th>it&gt; actio</th><th>on will allo <b>an</b></th><th>ow TA Pro</th><th>ovider to navi</th><th>gate to the N</th><th>lanage Wc ad 🖻 Add Comm</th><th>rk Plan pa ents ∳Validate</th><th>age. Plan ∳Su</th><th>bmit Pl</th></ed<>	it> actio	on will allo <b>an</b>	ow TA Pro	ovider to navi	gate to the N	lanage Wc ad 🖻 Add Comm	rk Plan pa ents ∳Validate	age. Plan ∳Su	bmit Pl
cking C M	g on <b>lana</b> rovider	the age	<ed • Wo</ed 	it> actio	on will allo <b>an</b>	ow TA Pro	ovider to naviş Work Plan Number:	gate to the N	anage Wc	rk Plan pa ents ∳Validate WP	age. Plan ∳Su -015	bmit P
cking D M TA Pro Last L	g on <b>lana</b> rovider Update	the <b>age</b> Named Da	<ed • W( •:</ed 	it> actio ork Pla	on will allo an 06/29/2021	ow TA Pro	ovider to naviş Work Plan Number: Work Plan Title:	gate to the N	lanage Wc ad 🖀 Add Comm	rk Plan pa ents ∳Validate WP WP	age. Plan <b>∢</b> Su -015 Title	bmit P
Cking D M TA Pro Last L Grant	g on <b>lan</b> a rovider Update t Numb	r Nam ed Da ber:	<ed • W( •:</ed 	it> actio	on will allo an 06/29/2021	ow TA Pro	ovider to navig Work Plan Number: Work Plan Title: TA Type:	gate to the N	lanage Wc ad 🖀 Add Comm	rk Plan pa ents ≉ Validate WP WP PFS-Capa	age. Plan ∢Su -015 Title acity	bmit P 🕑 Edit
Cking M TA Pro Last L Grant Appro	g on <b>lana</b> rovider Update t Numb opriati	r Nam ed Dar ber: ion Co	<ed • W( • : te: • de:</ed 	it> actio	on will allo <b>an</b> 06/29/2021	ow TA Pro	ovider to naviş Work Plan Number: Work Plan Title: TA Type: Work Plan Type:	gate to the N	lanage Wc ad 2 Add Comm PFS - Ca	rk Plan pa ents ≉ Validate WP WP PFS-Capa spacity assessr	age. Plan ✓ Su -015 Title acity ment	bmit P
Cking M TA Pro Last L Grant Appro Project	g ON <b>lana</b> rovider Update t Numb opriati ect Numb	r Nam ed Dar ber: ion Co mber:	<ed W( e: te: ode:</ed 	it> actio ork Pla	on will allo an 06/29/2021 Administration	ow TA Pro	ovider to naviş Work Plan Number: Work Plan Title: TA Type: Work Plan Type: Peformance Period	gate to the N Back Downlo	ad 2 Add Comm PFS - Ca	rk Plan pa ents ≉ Validate WP PFS-Capa pacity assessr 01/02/2	age. Plan ♦ Su -015 Title acity ment 2020	bmit P
Cking M TA Pro Last L Grant Appro Projec	g on <b>lana</b> rovider Update t Nume opriati act Nume cct Title	r Nam ed Da ber: ion Co mber: e:	<ed e Wo e: te: de:</ed 	it> action ork Pla CPD, H	on will allo an 06/29/2021 Administration busing, Public Housing, CC	ow TA Pro	Ovider to navig Work Plan Number: Work Plan Title: TA Type: Work Plan Type: Peformance Period Peformance Period	gate to the N (Back) Downlo Start Date: End Date:	ad 2 Add Comm PFS - Ca	ents ✓ Validate WP WP PFS-Cap 01/02/2 01/02/2	age. Plan ✓ Su -015 Title acity ment 2020 2020	bmit P
Cking TA Pro Last L Grant Projec Projec Grant	g ON <b>lana</b> rovider Update t Numb opriati ect Num ect Title tee Pro	n the age r Nam ed Dar ber: ion Co mber: e: ogram	<ed e W( e: te: de:</ed 	it> action ork Pla CPD, H	on will allo an 06/29/2021 Administration busing, Public Housing, CC	ow TA Pro	Ovider to navig Work Plan Number: Work Plan Title: TA Type: Work Plan Type: Peformance Period Peformance Period Approved Work Pla	gate to the N (Back) Downlo Start Date: End Date: n Budget:	ad 2 Add Comm PFS - Ca	ents ✓ Validate WP WP PFS-Capa 01/02/2 01/02/2	age. Plan ✓ Su -015 Title acity ment 2020 2020	bmit P
Cking TA Pro Last L Grant Appro Projec Grant Work	g ON Iana rovider Update t Nume opriati ect Nume ect Title tee Pro	I the age r Nam ed Da ber: ion Co mber: e: ogram Status	<ed e Wo e: te: ode:</ed 	it> action ork Pla CPD, H	On will allo an 06/29/2021 Administration busing, Public Housing, CC X Open	ow TA Pro	Ovider to navig Work Plan Number: Work Plan Title: TA Type: Work Plan Type: Peformance Period Peformance Period Approved Work Pla	gate to the N	ad 🖻 Add Comm PFS - Ca	ents ✓ Validate WP WP PFS-Capa upacity assess 01/02/2 01/02/2	age. Plan ✓ Su -015 Title acity ment 2020 2020	bmit P



Us	User Role: Grantee User Menu Option: Q Manage Work Plans				
	Refer to the Section B1 above to add/edit Work Plan information using each tab.				
3	Secondary navigation available on the <b>"Manage Work Plan"</b> page allows Users to add comments, validate Work Plan, and Submit Work Plan for HUD Review.				
	CPD Disaster Recovery Grant Reporting System				
	I Manage Work Plan    Submit Plan    Submit Plan    Submit Plan    Submit Plan				
	TA Provider Name:Work Plan Number:WP-015C EditLast Updated Date:06/29/2021Work Plan Title:WP TitleGrant Number:TA Type:PFS-CapacityMarch Share Sha				
4	TA Providers can use the <b><download></download></b> action on the <b>"Manage Work Plan"</b> page to download the Work Plan in a PDF format.				
5	TA Providers can use the <b><add comments=""></add></b> action on the " <b>Manage Work Plan"</b> page to add Work Plan Comments.          Add Work Plan Comments       ×         Use the general comments option, unless you are a GTM providing approval recommendations.       *				
	* Comment Type: O Review Recommendation G General Comment				
	* Comments: Enter Comments				
6	TA Providers can use the <b><validate plan=""></validate></b> action on " <b>Manage Work Plan"</b> page to validate the Work Plan and provide a list of Warnings and Errors.				
	<b>O Errors Found</b> The following issues were found by the automated data validation checks and must be resolved prior to next submission                × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention                × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention               × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention               × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention               × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention               × <b>A Warnings Found</b> The following issues were found by the automated data validation checks and may need attention               × <b>A Warnings Found</b> The following issues were found by the automated data validation             checks and may need attention                A Lot data to ne autoput for following Tasks. Initialization                A Lot data to n				
7	TA Providers can use the <b><submit plan=""></submit></b> action on the " <b>Manage Work Plan</b> " 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: Q Manage Work Plans
	Warnings found	×
	Validation of this work plan succeeded However, one or more warnings were found that may need your attention. Would you like to go back and review these warnings before submitting your work plan?	
	Continue Submissio Review Warning	n Is
8 TA Providers will have t Submit Amendment, Ca	the option to submit the Work ancel Work Plan, Close Work Pla	Plan using following options: Submit Modification, an, or On-Hold.
Submit Work Plan		×
★ Work Plan Status:	✓ Select One	
★ Submission Comments:	Submit Modification Submit Amendment Cancel Work Plan Close Work Plan	
		Cancel 🖌 🛠 Submit

### C2. Grantee | Edit Work Plan Details

User Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans				
<b>Purpose:</b> Allow TA Provider Users to edit the content of a Work Plan.					
Complete the following steps to edit a Work Plan:					
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: <b>Q</b> Manage Work Plan	ns
2 Select the <b><edit></edit></b> action i	n the header.		
🔟 Manage Work Plan		ፋ Back 🚦 Download 👩 Add Comments 🗇 Validate Plan 🗳 Submit F	Plan
TA Provider Name: Last Updated Date:	09/14/2021 Work Plan Number: Work Plan Title:	Work Plan 10504 gr tel Automation Test Add Work Plan 10504	
Grant Number: Appropriation Code: Project Number:	IA Iype: Work Plan Type: Administration Performance Period Start Date	Admin Administration :: 01/01/2021	
Project Title: CPD, Housing, P Grantee Program:	Public Housing Performance Period End Date: Approved Work Plan Budget:	12/31/2021	
WORK Plan Status:	Cipen Proposed Work Man Budget:		
The <b>"Edit Work Plan"</b> pag	ge will be displayed. TA pro	oviders can update Project, Grantee	Program,
Work Plan Number, Wo	ork Plan Title, Work Plan	(Activity) Type, TA Type (Activity C	Category),
Performance Period Star	t Date, Performance Period	d End Date using the " <b>Edit Work Plan</b>	″ page.
Edit Work Plan			×
Details			
Creat Number	00-0044T LT 40 NM 07 0000		
The Grant Number:	80x03441   1-12-NN-27-0023		
<b>*</b> TA Provider:	Minnesota Housing Partnership		
<b>★</b> Project:	NSP12 / NSP	\$	
Grantee Program.			
orantee Program.			
🔆 Work Plan Number:	T-12-NN-27-002		
<b>*</b> Work Plan Title:	Enter Work Plan Title		
🗚 Work Plan (Activity)	TA - Direct	X v	
Type:			
<b>*</b> TA Type (Activity Category):	TA - Direct		
* Performance Period	₩ 06/15/2013		
Start Date:			
★ Performance Period End Date:	<b>iii</b> 10/31/2014		
_		Cancel Save	
Selecting < <b>Cancel&gt;</b> will al	low TA Providers to cancel	any updates made to the Work Plan	Selecting
< <b>Save&gt;</b> allows TA provide	ers to save the updates ma	de to the Work Plan.	- 5.000110
Saving the changes will to	rigger a success message "	TA Work Plan has been saved succes	sfullv"
Saving the changes will th	IIEEEI a SULLESS IIIESSABE	TA WOLK FIGHTIGS DEEH SAVED SUCCES	siully .
Information in individual	tabs can be edited as spec	ified in sections <b>C4 – C22</b> below.	



#### C3. Grantee | Associate Assignments

User Role: Grantee User Menu Option: Q 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:				
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 <b>"Manage Work Plan"</b> page.				
Select the Assignments tab. Then, select <associate assignment=""> to display the "Associate Assignment" page.</associate>				
Associated Assignments         Respire/OBLIs         Tasks         Organizations           Associated Assignments         No Assignments found         Image: Comparison of the second secon	Financials Documents Measures Outcomes History           Outcomes         History           Associate Assignment         Associate Assignment			
TA Providers can search using Assignment ID, T, TA Type. Provide the search criteria and select < Associate Assignment Select the available Assignments you wish to associate with this Work Plan.	A Provider, Organization Assisted, and Approved Search> to retrieve results.			
Search Criteria       Assignment ID:       T-31       Organization       Assisted:         Enter Organization         Reset         Search	rovider: Minnesota Housing Partnership roved TA Select One h			
Matching Results 1 Assignment ID TA Provider Organization T-31 Minnesota Housing Partnership M First & Previous 1 Na	Assisted Approved TA Type Last Modified Date TA - Direct 08/04/2021			
4       Select the assignments that are to be association. A success message is assignments will be displayed in the Assignment.         Assignments       Scope       People/OBLIs       Tasks       Organizations       Financia	ted to the Work Plan. Then, select <b><save></save></b> to displayed on the top right corner and associated s tab.			
Associated Assignments  Assignment Number TA Provider  TA Type La T-31 Minnesota Housing Partnership TA - Direct See T-62 Minnesota Housing Partnership TA - Direct See	Modified By     Last Modified On     Status     Actions       TA Portal Record     08/04/2021     Drafted     Image: Compared to the status       TA Portal Record     08/04/2021     Assigned     Image: Compared to the status			



User Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans	
The following details are provided for associated as TA Type, Last Modified By, Last Modified On, Status	ssignments: Assignment Number, TA Provider, S.	
Selecting the pencil icon in the Actions column allo Assignment" page for the selected assignment.	ows TA Providers to navigate to the <b>"Manage</b>	
Selecting the trash can icon <b>in the Actions column</b> v	will delete the current association.	

### C4. Grantee | Associate Work Plans

User Role: Grantee	User	Menu Option: <b>Q</b> Manage Work Plans			
<b>Purpose:</b> Allow TA Provider Users to associate Work Plans to another Work Plan.					
Complete the following steps to associate Work Plan to another Work Plan:					
<sup>1</sup> Follow the steps in the Actions co	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 <b>"Manage Work Plan"</b> page.				
2 Select the Assigned and the Assigned at the Select the Assigned at the Select the Assignment Assi	2 Select the Assignments tab. Then, select <associate plan="" work=""> from the Assignments tab to display the "Associate Work Plan" page.</associate>				
Associated Assignments No Assignments found Associated Work Plans No Work Plans found		© Associate Assignment © Associate Work Plan			
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 < <b>Save&gt;</b> to associate a Work Plan.					



Associate Work Plan						×
Select the available Work Plans you wish to associate with this Work Plan.						
Search Criteria 🔹						
Work Plan	···-		TA Provid	er: Abt Associates Inc		÷
Number:	WP					
Work Plan	Select Option		\$			
урс.			Reset			
atching Res	ults 👍	TA Provider	TA Work Plan Type	🔶 Last Modified By	Last Modified	∳ Statue ∳
WP-0901	2011-1	Abt Associates	PFS - Capital Raising/Stru Building	icture Kavitha Vemula	09/01/2021	Open
ABT-M-18 BRIDGE V	5-042-04 SNAPS AAQ VP	Abt Associates Inc	TA - AAQ	Francisco Crovetto- Aparicio	03/23/2020	Closed
) ABT-C-19	9-002-02 WP Coord	Abt Associates Inc	TA - Coordination	Jeffrey Hunt	03/23/2020	Approved
ABT-C-19	9-001-01 WP Admin	Abt Associates	Administration	Thyria Alvarez	03/23/2020	Approved
		Inc				
		Inc Inc	First ∮Previous 1 Next ▶	Last 🖡	S	Show 10 Rows 🗢
success r	message is dis n the <b>Assignme</b>	splayed aft	er successful a	association, and a	s Can associated	show 10 Rows 💠 Icel 🖻 Save Work Pla
success r played of Assignments Associated Assig Assignment Number 7-31	message is dis n the Assignme Scope People/OBLIs gnments ? r TA Provider Minnesota Housing	splayed aft ents tab. Tasks Organ	er successful a izations Financials TA Type € Last Modifier TA - Direct See TA Portal	Last M association, and a Documents Measures 4 by Last Modified On Record 08(04/2021	Can associated Dutcomes Surveys	Show 10 Rows Cel Save Work Pla Mesoclate Assignment Actions C
SUCCESS I played of Assignments Associated Assig Assignment Number T-31 T-62	message is dis n the <b>Assignme</b> Scope People/OBLIs gmments ? Minnesota Housing Minnesota Housing	Inc Splayed aft ents tab. Tasks Organ Partnership Partnership	er successful a izations Financials TA Type 0 Last Modified TA - Direct See TA Portal I TA - Direct See TA Portal	Last M association, and a Documents Measures of dBy tast Modified On Record 08/04/2021 Record 08/04/2021	Can associated Dutcomes Surveys	Show 10 Rows \$
SUCCESS IT played of Assignments Assignment Number T-31 T-62 Associated Work Workplan Number	message is dis n the Assignme scope People/OBLIs gaments ? r * TA Provider Minnesota Housing Minnesota Housing	Inc Inc Splayed aft ents tab. Tasks Organ Partnership Partnership	er successful a izations Financials TA - Direct See TA Portal I TA - Direct See TA Portal I	Last M association, and a Documents Measures a d By C Last Modified On Record 08/04/2021 Record 08/04/2021	Surveys	Show 10 Rows
SUCCESS IT played of Assignments Associated Assig Associated Assig Associated Work Workplan Number ABT-M-15-042-04 SN	message is dis n the Assignme Scope People/OBLIs gnments ? r ^ TA Provider Minnesota Housing Minnesota Housing 1 c Plans ?	Inc H i splayed aft ents tab. Tasks Organ Partnership Partnership At Associates Inc	irst 4 Previous 1 Next ► er successful a izations Financials • TA Type • Last Modified TA - Direct See TA Portal I TA - Direct See TA Portal I • Work Plan Type TA - AQ	Last M association, and a Documents Measures o  By Last Modified On Record 08/04/2021 Record 08/04/2021  Period of Performance 07/22/2019 - 10/31/2019	S Can associated Dutcomes Surveys 0 0 5 Status 0 0 Drafted Assigned 0 Closed	Show 10 Rows \$

#### C5. Grantee | Edit Scope Description

User Role: Grantee User	Menu Option: <b>Q</b> 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:				



Use	<b>r Role:</b> Grantee U	Jser		Menu Option	<b>: Q</b> Manage W	ork Plans	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon <b>i</b> in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.				on 🗹		
2	Select the Scop Description" pa	pe tab. Then, se ge will open.	lect < <b>Edit&gt;</b> in the	e Scope Descrip	Messures Outcomes	The <b>"Edit S</b>	Scope
	Scope of Work		-				
	*Scope Description					🕼 Edit	
	Strategic Goals	No Results Found				🗭 Edit	
	Proposed Milestones	No Results Found				O Add Milestone	
	The remainder of this page is intentionally blank.						



Use	<b>Role:</b> Grantee User	Menu Option: <b>Q</b> Manage Work Plans				
3	Enter the desired narrative in the text area. Select <b>Save&gt;</b> to save the scope description. A success message is displayed upon saving the scope description.					
	Edit Scope Description ×					
	File Edit View Insert Format Tools Table					
		${\sim}$ $\blacksquare$ $\checkmark$ $\mathscr{S}$				
	MHP is authorized to incur Pre-Award costs as need fact it incurred 2.9%. The acitivites undertaken inclu	ed up to 10% of the award. As a matter of ded but were not limited to:				
	Attendance at HUD's NSP TA 2011 kickoff meeting in and conference calls. Setup of administrative system (Omaha NE, Pueblo CO, Greeley CO, Weld CO). Per to Omaha NE related to DRGR issues. Training/refre staff on NSP processes.	March of 2012. Attendance on webinars ns. Completion of 4 needs assessments ormance of On-Call technical assistance sher and dissemination of guidance to				
	P	<i>i</i> ,				
		Cancel Save				

### C6. Grantee | Edit Strategic Goals

User Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans				
<b>Purpose:</b> Allow TA Provider Users to add or remove Strategic Goals for a Work Plans.					
Complete the following steps to add or remove strategic goals:					
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 <b>"Manage Work Plan"</b> page.					



User Role: Grantee User		Menu Option: Q Manage Work Plans
2 Select the <b>Scope</b> tab. S is displayed.	elect <b><edit></edit></b> in the <b>Strategic</b>	Goals section. The "Edit Strategic Goals" page
Assignments Scope Peopl Scope of Work	2/OBLIs Tasks Organizations Financia	Is Documents Measures Outcomes History
*Scope Description		Ø fot
Strategic Goals No Results Found		Q táo
Proposed Milestones No Results Found		Add     Milectore
3 Select the applicable st that addition of strateg	rategic goals and select < <b>Sav</b> ic goals to the Work Plan.	<pre>/e&gt;. A success message is displayed to confirm</pre>
Select any Strategic Goal(s) that the Work Plan supports:	Homelessness Goals         Promote Collaborative Leadership         Reduce Financial Vulnerability         Strengthen Capacity and Knowledge         Integrate Health Care with Housing         Advance Health and Housing Stability         Advance Health and Housing         Provide Affordable Housing         Provide Permanent Supportive Housir         Increase Economic Security         Transform Crisis Response Systems	for Youth for Adults g
	2018-2022 Strategic Goals	
	Goal 1: Advance Economic Opportunity All/General Bolster Growth in Opportunity Zones Develop Envision Centers Fnhance Rental Assistance Promote Section 3 Reduce Barrieers to Affordable Housin Reduce Homelessness Remove Lead-Based Hazards and Oth Support Effectiveness and Accountab Support Fair, Sustainable Homeowner	ig er Health Risks from Homes lilty in Long-Term Disaster Recovery ship and Financial Viability
	Goal 2: Protect Taxpayer Funds	
		Cancel Case



#### C7. Grantee | Manage Proposed Milestones

Use	<b>er Role:</b> Grantee User	Menu Option: <b>Q</b> Manage Work Plans						
Pui	Purpose: Allow TA Provider Users to add, edit, and delete Milestones for a Work Plans.							
M	<ul> <li>Complete the following steps to manage add,</li> </ul>	edit, and delete milestones:						
1	Follow the steps provided in Section C1 to search in the Actions column to navigate to the <b>"Mana</b> ,	ch for a Work Plan. Then, select the pencil icon 🗗 ge Work Plan" page.						
2	In the <b>Scope</b> tab, select <b><add milestone=""></add></b> in the window.	e Milestone section to open the "Add Milestone"						
	Assignments Scope People/OBUs Tasks Organizations	Financials Documents Measures Outcomes History						
	*Scope Description	ig to:						
	Strategic Goals No Results Found	🖉 Est						
	Proposed Milestones No Results Found	O Add Millettine						
3	Specify the Milestone and Expected Date. The Work Plan.	n, select < <b>Save&gt;</b> to add the milestone to current						
	Kilestone: Enter Milestone Expected Date: 10/10/2021							
	The milestone is displayed in a table.	Cancel Save						
	Proposed Milestones Test Milestone Test Milestone 2	Expected Date Actions 08/31/2021 10 27						



Use	ser Role: Grantee User					Menu Option: <b>Q</b> Manage Work Plans				
4	Sel ico	ect the pencil i n in the Action	con in the Actio s column to del	ns columi ete the m	n to modi nilestone.	ify the select	ed mileston	e. Select tł	ne trash ca	n
		Assignments Sc	ope People/OBLIs	Tasks	Organizations	Financials	Documents	Measures	Outcomes	
		Scope of Work								
		*Scope Description								
		Strategic Goals	No Results Found							
		Proposed Milestones	Milestone			Expected Date			Actions	I M
			Test Milestone 2			08/31/2021				
	L3	\$	NGL MINGAUNE 2			53[23]2023			au (2)	

### C8. Grantee | Edit Travel Budget

User	Role: Grantee	User	Menu Option: <b>Q</b> Manage Work Pla	ans
Purp	oose: Allow TA F	Provider Users to edit the Work Pla	an's travel budget.	
V	Complete the	following steps to edit the travel l	oudget:	
1 <sup>f</sup> i	Follow the steps n the Actions co	provided in Section C1 to search olumn to navigate to the <b>"Manage</b>	for a Work Plan. Then, select the per Work Plan" page.	ncil icon 🗹
2 <sup>5</sup> E	Select the Peop Budget" page wil	le/OBLIs tab. Then, select <edit> l open. resplations Tais Crystications Finan</edit>	in the <b>Travel Budget</b> section. The	<sup>"</sup> Edit Travel
	People/Other Budget Line	* Travel Budger: \$0.00	(gr ta	ie .
	Other Budget Line Item Costs + Travel	Budget Line Nem Trip Associated Tasks Descripti	an Start Date End Date Amount Actions O Add	Cont
	Labor Budget	* (abor Budget: 50.00	QF to	fit.
	Proposed Personnel	Lead POC Labor Category & Personnel Occupation Type Email Organization 1 TOTAL:	tan't Dete End Date Rate/HR Total Hours Status Actions Percent	
	- HUD Reviewers 🕤	Role A Staff Member Name Office GTR Nana Doherty HUD HEADQUA	ITEIS 1311HC@dminc.com	



Us	<b>er Role:</b> Grantee User		Menu Option: Q	Manage Work	Plans				
3	Benter the amount and select <b>Save&gt;</b> to add the travel budget to the current Work Plan. A message is displayed upon saving the travel budget.								
	Edit Travel Budget				×				
	★ Travel Budget Amount:	\$							
				Cancel 🕞 S	ave				

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

Use	<b>r Role:</b> Grantee	User		Μ	Menu Option: <b>Q</b> Manage Work Plans					
Pur	<b>Purpose:</b> Allow TA Provider Users to add other budget line item costs to a Work Plans.									
2	Complete the following steps to add other budget line item costs:									
1	Follow the step in the Actions c	s provided in S olumn to navi	Section C1 to se gate to the <b>"Ma</b>	earch for a I <b>nage Wo</b>	a Work Pla <b>rk Plan"</b> pa	an. Then age.	ı, selec	ct the	pencil i	con 🗹
2	Select the <b>Peop</b> section. The " <b>A</b> People/Other Budget Line	eltems	Then, select <b><ac< b=""> set Line Item Co</ac<></b>	dd Cost> i st″ page	n the <b>Othe</b> will open.	er Budge	et Line	ltem (	Costs +	Travel
	Travel Budget	* Travel Budget:	\$0.00						🕼 Edit	
	<ul> <li>Other Budget Line Item</li> <li>Costs + Travel </li> </ul>	Budget Line Item	Trip Associated Tasks	Description	Start Date	End Date	Amount	Actions	• Add Cost	
	Labor Budget	* Labor Budget:	\$0.00						🕼 Edit	
	Proposed Personnel	Lead POC Labor Category & Personnel TOTAL:	Occupation Type Email Orgu	inization Start Date	End Date Rate/HR	Total Hours Status 0	Actions	Add Personnel		
	- HUD Reviewers 🕦	Role A Staff Member GTR Nanci Doherty	Name 🔶	Office HUD HEADQUARTERS	¢	Email T011FO@dminc.com		0		



Use	<b>er Role:</b> Grantee User		Menu Option: <b>Q</b> Manage Work Plans				
3	TA providers can select a Budg Line Item Description, Start message is displayed after add	get Line Item, provide Date, End Date, Buo ding the budget line it	information for Trip, Associated Tasks, Budget dget Amount, and select < <b>Save&gt;</b> . A success tem.				
	Add Other Budget Line Item Cost		×				
	Enter the values and click save.						
	★ Budget Line Item:	OTHER	\$				
	Trip:						
	Associated Tasks:						
	* Budget Line Item Description:						
	* Start Date:	10/10/2021					
	* End Date:	10/10/2021					
	★ Budget Amount:	\$ Enter Cost					
			Cancel Save				
4	The newly added cost is displa the selected cost. Select the t	yed in a table. Select t rash can icon in the A	the pencil icon in the Actions column to modify Actions column to delete the cost.				
	Other Budget Line Item Trip Costs + Travel	Associated Tasks Description Lorem josum dolor sit amet	Start Date         End Date         Amount         Actions         O Acti Cost           10/18/2021         10/21/2021         \$1.00         If (r)         If (r)         If (r)				

### C10. Grantee | Edit Labor Budget

User Role: Grantee User	Menu Option: <b>Q</b> 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 B	udget:
Follow the steps provided in Section C1 to search f in the Actions column to navigate to the <b>"Manage</b> "	or a Work Plan. Then, select the pencil icon 🗹 Work Plan" page.



Use	er Role: Grantee	e User			Menu Optic	on: <b>Q</b> M	anage <sup>v</sup>	Work	Plans	
2	Select the Peo Labor Budget"	<b>ple/OBLIs</b> window.	tab. Then, s	elect < <b>Edit&gt;</b> ir	the <b>Labor I</b>	Budget s	section	to o	pen th	e " <b>Edit</b>
	People/Other Budget Lin	e Items								
	Travel Budget	★ Travel Budget:	\$0.00						Ca Edit	
	Other Budget Line Item Costs + Travel	Budget Line Item OTHER	Trip Associated Tasks	Description Lorem ipsum dolor sit amet	Start Date 10/18/2021	End Date 10/21/2021	<b>Amount</b> \$1.00	Actions	• Add Cost	
	Labor Budget	* Labor Budget:	\$0.00						<b>Gf</b> Edit	
	<ul> <li>Proposed Personnel ()</li> </ul>	Lead POC Labor Category &	Personnel Occup	ation Type Email Organizz	tion Start Date En	d Date Status	Actions	Add Personnel		
	<ul> <li>HUD Reviewers 1</li> </ul>	Role Si GTR Na	taff Member Name nrci Doherty	Office     HUD HEADQUARTERS	\$	Email T011FO@dminc.com		¢		
3	Enter the amou upon adding a	unt and sel labor budg	lect < <b>Save&gt;</b> t get amount.	o add labor bu	dget amoun	t. A suc	cess me	essag	e is dis	played
	Edit Labor Budget							×		
	★ Labor	<sup>.</sup> Budget Amou								
							Cancel		Save	

### C11. Grantee | Manage Proposed Personnel

User R	Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans
Purpos	se: Allow TA Provider Users to add personnel to	or remove personnel from a Work Plans.
2	Complete the following steps to add or remove p	personnel:
1 Fol in t	llow the steps provided in Section C1 to search f the Actions column to navigate to the <b>"Manage V</b>	or a Work Plan. Then, select the pencil icon 🗹 Nork Plan" page.



	ser		Menu Option	n: <b>Q</b> Manage Work	< Plans
Select the <b>People</b>	<b>/OBLIs</b> tab.	Then, select < <b>A</b>	.dd Personnel> in the	e Proposed Person	nel section t
open the Add Per	sonner wind	low.			
People/Other Budget Lin	e Items				
Travel Budget	★ Travel Budget:	\$0.00			
<ul> <li>Other Budget Line Item</li> </ul>	Budget Line Item	Trip Associated Tasks	Description	Start Date End Date	Amount Act
Costs + Travel 1	OTHER		Lorem ipsum dolor sit amet	10/18/2021 10/21/2021	51.00 <b>U</b>
Labor Budget	* Labor Budget:	\$0.00			
Proposed Personnel	Lead POC Labor Category &	& Personnel Occup	tion Type Email Organization	Start Date End Date Statu	Add Personne
	Role	Staff Member Name	Office	🔶 Email	
<ul> <li>HUD Reviewers (1)</li> </ul>	GTR N	lanci Doherty	HUD HEADQUARTERS	T011FO@dminc.com	
TA providers can Hours, Start Date, Work Plan.	search for L End Date, Le	Labor Category ead POC. Select	& Personnel, and se ing <b><save></save></b> will add t	elect <b>Rate, Propos</b> he selected persor	ed Number of nnel to curren
TA providers can Hours, Start Date, Work Plan.	search for L End Date, Lo	abor Category ead POC. Select	& Personnel, and se ing <b><save></save></b> will add t	elect <b>Rate, Propos</b> o he selected persor	ed Number of anel to current x
TA providers can Hours, Start Date, Work Plan.	search for L End Date, Lo	abor Category ead POC. Select	& Personnel, and set ing <b><save></save></b> will add t	elect <b>Rate, Propos</b> e the selected persor	ed Number of anel to current x
TA providers can Hours, Start Date, Work Plan. Add Personnel	search for L End Date, Lo Display ersonnel: Search L	Labor Category ead POC. Select	& Personnel, and set ing <b><save></save></b> will add t	elect <b>Rate, Propos</b> e the selected persor	ed Number
TA providers can Hours, Start Date, Work Plan. Add Personnel	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ	Labor Category ead POC. Select y Inactive Labor Categories , F Labor Categories	& Personnel, and set ting <b><save></save></b> will add t rersonnel and Rates	elect <b>Rate, Propos</b> o	ed Number of anel to current with the second
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Per * Proposed Number C	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ Of Hours: 0	Labor Category ead POC. Select y Inactive Labor Categories Labor Categories	& Personnel, and set ting <b><save></save></b> will add t rersonnel and Rates	elect <b>Rate, Propos</b> e the selected persor	ed Number of anel to current x
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * Sta	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ of Hours: 0 art Date: 10	Labor Category ead POC. Select y Inactive Labor Categories , F Labor Categories	& Personnel, and set ing <save> will add t rersonnel and Rates</save>	elect <b>Rate, Propos</b> o	ed Number of anel to current x
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * Sta * E	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Catego of Hours: 0 art Date: 10 nd Date: 10	Labor Category ead POC. Select y Inactive Labor Categories , F Labor Categories	& Personnel, and set ing <save> will add t rersonnel and Rates</save>	elect <b>Rate, Propos</b> e the selected persor	ed Number of the current of the curr
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * Sta * E	search for L End Date, Le Display ersonnel: Search L * Rate: Labor Categ Of Hours: 0 art Date: 10 nd Date: 10 cad POC: Yes	Labor Category ead POC. Select y Inactive Labor Categories , F Labor Categories gory & Personnel selection required 0/10/2021	& Personnel, and set ing <save> will add t rersonnel and Rates</save>	elect <b>Rate, Propos</b> o	ed Number of anel to current x
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * sta * E Le	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ Of Hours: 0 art Date: 10 and Date: 10 and Date: 10 and POC: Yes	Labor Category ead POC. Select y Inactive Labor Categories , F Labor Categories	& Personnel, and set ing <save> will add t rersonnel and Rates</save>	elect <b>Rate, Propose</b> the selected persor	ed Number of anel to current ×
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * Sta * E Le	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ of Hours: 0 art Date: 10 nd Date: 10 ard POC: Yes	abor Category ead POC. Select y Inactive Labor Categories , F Labor Categories pory & Personnel selection required 0/10/2021 Personnel field	& Personnel, and set ing <save> will add t rersonnel and Rates</save>	elect <b>Rate, Propose</b> the selected persor	ed Number of anel to current ×
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * sta * E Le NOTE: The Labor C labor category, th	search for L End Date, Lu Display ersonnel: Search L * Rate: Labor Categ of Hours: 0 art Date: 10 nd Date: 10 nd Date: 10 category & L e Labor Categ	Labor Category ead POC. Select	& Personnel, and set ing <save> will add t rersonnel and Rates irst.</save>	elect <b>Rate, Propose</b> the selected persor (Cancel eld showing the Ra	ed Number of anel to current in a current in
TA providers can Hours, Start Date, Work Plan. Add Personnel * Labor Category & Pe * Proposed Number C * stu * E Le NOTE: The Labor C labor category, th labor category, an	search for L End Date, Lo Display ersonnel: Search L * Rate: Labor Categ of Hours: 0 art Date: 10 and Date: 10 and Date: 10 category & category & e Labor Category & e Labor Category &	Labor Category ead POC. Select y Inactive Labor Categories, F Labor Categories pory & Personnel selection required ()/10/2021 )/10/2021 Personnel field egory name, the ponnel's status. In	& Personnel, and set ing <save> will add t resonnel and Rates</save>	elect <b>Rate, Propose</b> the selected persor eld showing the Rate of individuals associ that will be used t	ed Number anel to current x sate Type for tiated with the co support the



Us	er Role: Grantee	User		I	Menu C	Option	: <b>Q</b> N	∕lanage	Wor	rk Plans	
4	The select labor	category and ra	ite is displa	iyed in a ta	ble.						
	<ul> <li>Proposed Personnel (1)</li> </ul>	Lead POC Labor Category & Personnel STAFF   Grammar Fascist   Iris Rhoads TOTAL:	Occupation Type Email Iris.L.Rh	Org ads@demonstration.com Crai	ganization Start Da fts Canada 10/18/20	te End Date 21 10/22/2021	Rate/HR To \$125.00	0 Approved 0	Actions	O Add Personnel	
	Select the penci specific individu	l icon in the Act al's name, chan	ions colun ge the esti	nn to modi <sup>.</sup> mated hou	fy the s irs, etc.	electe ). If h	ed rov ours l	w (e.g., have no	repla	ace TBD with a en allocated to	

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: Q Manage Work Plans				
Pu	rpose: View HUD	Reviewer	s associated w	vith a Work	Plan.				
M	Complete the	following	steps to view	HUD Revie	wers:				
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon <b>C</b> in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.								
2	2 Select the <b>People/OBLIs</b> tab. The <b>HUD Reviewers</b> section displays information about HUD Reviewers by <b>Role, Staff Member Name, Office, and Email</b> .								
		GTR TOS	39FOFirst T039FOLast	HUD HEADQ	JARTERS	T039FO@dminc.com			

### C13. Grantee | Manage Tasks

User Role: Grantee User	Menu Option: Q 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:					
Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon <b>r</b> in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.					



Us	User Role: Grantee User Menu Option: Q Manage Work Plans				
2	Select the <b>Tasks</b> tab. T	hen, select < <b>Add Task&gt;</b> to op	en the <b>"Add Task"</b> page.		
	Assignments Scope P	People/OBLIs Tasks Organizations	Financials Documents Measures Outcomes History		
	Tasks		✓ Expand All 🔷 Collapse All 🕒 Add Task		
3	To add a new task for t Task Status, Performa (Budget), Estimated Ho	he Work Plan, enter Task Nur ance Period Start Date, Per ours, and Topics. Then, select	nber, Task Name, Task Narrative (Description), formance Period End Date, Estimated Cost < <b>Save&gt;</b> to save the task.		
	Add Task		×		
	★ Task Number: ★ Task Name:	2 Enter Task Name			
	* Task Narrative (Description):	Enter Narrative			
	<b>*</b> Task Status:	Open 💠	ĥ		
	* Performance Period Start Date:	<b>iii</b> 10/10/2021			
	* Performance Period End Date:	10/10/2021			
	<b>*</b> Estimated Cost (Budget):	\$ 0.00			
	<b>*</b> Estimated Hours:	0			
	Topics:	Homelessness AHAR/Point in Time Count AHAR Participatio AHAR/Point in Time Count Data analysis repo CPD-SN: CARES Act: ESG CPD-SN: CARES Act: COUNCIESS CPD-SN: Coro Coordinated Entry CPD-SN: COC Governance	n rting		
			Cancel Save		
4	The task is then display the task details, person	yed on the <b>Tasks</b> tab. Select th nnel budget, and outputs sec	ne Expand icon next to the Task Name to show tions.		
	Tasks		© Add Tark		
	Task 1: Test Task	Start/End Date: 01/31/2021 - 11/23/2022 Estimated Hour	10 Estimated Cost: \$50.00 Statur: Open Dents		
5	Select < <b>Edit&gt;</b> to edit th Start Date, Performan	e Task Name, Task Narrative ce Period End Date, Estimate	Description), Task Status, Performance Period d Cost (Budget), Estimated Hours, and Topics.		



	lee User	Menu	u Option: <b>Q</b>	Manage Wo	rk Plans
<b>Fasks</b>					O Add Task
▼Task 1: Test Task	Start/End Date: 01/31/	2021 - 11/23/2022 Estimated Hours: 10	Estimated Cost: \$50.00	Status: Open	T Delete
Details	Narrative: Test Task			Ν	🕼 Edit
Personnel Budget	Topics: Key Labor Category & Personnel	Estimated Hours	Rate per Hour	Estimated Cost Status	😭 Edit
	TOTAL:	0		\$0.00	
Outputs	# Output Title Estimated Completion Date Ouput	Description			🖬 Edit
the task	has never been approv	ved, users may de	elete the ta	sk by selec	o Add Task
Details	Narrative: Test Task		Calification 2000	Status open	C Edit
	Topics:			l≱	
Personnel Budget	Key Labor Category & Personnel TOTAL:	Estimated Hours 0	Rate per Hour	Estimated Cost Status \$0.00	😭 Edit
Outputs	2 Output Title Estimated Completion Date Ouput	Description			Ca Cdit
Selecting < <b>E</b> window. TA who will sup	<u>* Output Title</u> Estimated Completion Date Output <b>Edit&gt;</b> in <b>Personnel Budge</b> providers can select key por port the task.	<b>t</b> section displays t ersonnel and specify	he " <b>Add/Ec</b> number of	i <b>t Task Pers</b> hours allocat	ed to eve over her
Outputs Selecting < <b>E</b> window. TA who will sup Tasks	<u>* Output Title</u> Stimated Completion Date Output <b>Edit&gt;</b> in <b>Personnel Budge</b> providers can select key pro- port the task.	t section displays t ersonnel and specify	the <b>"Add/Ec</b> r number of Estimated Cost: \$30.00	lit Task Pers hours allocat	er tex connel Bu ced to eve over tuk Elbers
Outputs Selecting < <b>E</b> window. TA who will sup Tasks -Task 1: Test Task Details	<u>* Output Title</u> <u>stimated Completion Date</u> <u>Output</u> <b>Edit&gt;</b> in <b>Personnel Budge</b> providers can select key pro- port the task. Start/End Date: 0/31/ Narrather: Test Data Tanlor	t section displays t ersonnel and specify	the <b>"Add/Ec</b> number of	lit Task Pers hours allocat	ered to even over the over
Outputs Selecting <e window. TA who will sup Tasks Task 1: Test Task Details Personnel Budget</e 	<u>* Output Till</u> <u>Stimated Completion Date</u> <u>Output</u> <b>Edit&gt;</b> in <b>Personnel Budge</b> providers can select key pro- port the task. Start/End Date: 0/3// Narrather: Tesk Topic: <u>Kar Zhores Caspar &amp; Personnel</u>	t section displays t ersonnel and specify 2021-11/23/2022 Estimated Hours: 10 Estimated Hours	the <b>"Add/Ec</b> r number of Estimated Cost: 55000	lit Task Pers hours allocat statue Open b Estimated Cost Status	ered to eve eved to eve even
Outputs Selecting <e vindow. TA vho will sup Tasks Task 1: Test Task Details Personnel Budget</e 	* Output Title     Stimated Completion Date     Output	t section displays t ersonnel and specify 2021-11/23/2022 Estimated Hours: 10 Estimated Hours 2	the <b>"Add/Ec</b> r number of Estimated Cost: 55000	lit Task Pers hours allocat statue: Open	© Act but © Act but © Act but © Correct © Correct



							-
Key	Labor Category & Personnel	1/01/2021   Lines C	#Hours	Rate	Total	Status	
0	STAFF I Manager Warner Logic 12010	02/02/2010 LTRD		\$4.00	\$0.00	Approved	
U	STAFF   Manager Warner, Leslie J 2019	-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
0	STAFF   Research Assistant Hassman, N	licole 2019-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
0	STAFF   Senior Manager Cuneo, Janine	2019-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
	STAFF   Manager Key, Chantel 2019-03	/02/2019   TBD		\$4.00	\$0.00	Inactive	
0	STAFF   Manager Richmond, Kristen B 2	2019-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
	CONTRACTOR   Albanese, Tom 2021-0	1/01/2021   User F		\$4.00	\$0.00	Approved	
	STAFF   Senior Associate Wolfe, Ilona T	2019-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
	STAFF   Senior Associate Ziolkowski, M	ichael 2019-03/02/2019   TBD		\$4.00	\$0.00	Inactive	
	STAFF   Manager Jones, Philip N 2019-	03/02/2019   TBD		\$4.00	\$0.00	Inactive	
	STAFF   Research Assistant Healey, Oliv	<i>i</i> ia 2019-05/01/2019   TBD		\$4.00	\$0.00	Inactive	
	STAFF   Associate Xu, Jie 2020-03/14/2	2020   TBD		\$4.00	\$0.00	Inactive	
	TOTAL:		0		\$0.00		
Sele pro <b>Dat</b>	ecting the < <b>Edit&gt;</b> link viders can add output e, Output Description	in the <b>Outputs</b> sectic is to current Work Pla •	on opens the n by specify	e " <b>Add/E</b> ing <b>Outr</b>	dit Task out Title,	Outputs" win Estimated Cor	dow. npleti
Sele Dro' Dat Tasks	ecting the <b><edit></edit></b> link viders can add output e, Output Description	in the <b>Outputs</b> sections to current Work Pla	n opens the n by specify	e "Add/E ing Outp	Edit Task out Title,	Outputs" win Estimated Cor	dow. npleti
Sele Dro Dat Tasks Task 1: Detail	ecting the <b><edit></edit></b> link viders can add output <b>ce, Output Description</b> Test Task	in the <b>Outputs</b> sections to current Work Pla • •	n opens the n by specify	e "Add/E ing Outp	dit Task out Title,	Outputs" win Estimated Cor e Aas but Sentue: Open @ Ese @ Ese	dow. <sup>-</sup> npleti
Sele Dro Dat Tasks Tasks Task 1: Detail	ecting the < <b>Edit&gt;</b> link viders can add output e, <b>Output Description</b> restTask Is Narrative: Test Task Tepic: nnel Budget Ky Laber Category	in the <b>Outputs</b> sections to current Work Pla	on opens the n by specify mated Hours: 10	e "Add/E ing Outp Estimated Cost: 55 Rate per Hour	Edit Task put Title,	Outputs" win Estimated Cor e Add Safe Status: Open @ Dever griss iCost Status @fee	dow.
Sele Dro Dat Tasks Task 1: Detail	ecting the < <b>Edit&gt;</b> link widers can add output e, Output Description : :Test Task ils Narrative: Test Task Topic: mnel Budget <u>Koy Laber Category</u> TOTAL:	in the <b>Outputs</b> sections to current Work Pla • • StervTind Date: 01/31/2021 - 11/23/2022 Ext 8 Personnel	on opens the n by specify imated Hours: 10 Estimated Hours 0	e "Add/E ing Outp Estimated Cost: 55 Rate per Hour	Edit Task out Title, ooo Etimatee	Outputs" win Estimated Cor Status: Open @ Est (Cest Status 5000	dow. npleti
Sele DrO' Dat Tasks Task 1: Detail Perso	ecting the <b><edit></edit></b> link widers can add output <b>ce, Output Description</b> test Tesk ils Narrative: Test Task Topic: ynnel Budget <u>Key Laber Category</u> toTAL: uts <u># Output Title Edit</u>	in the <b>Outputs</b> section is to current Work Pla Start/End Date: 01/31/2021 - 11/23/2022 Ent & Personnel	on opens the n by specify imated Hours Estimated Hours 0	e "Add/E ing Outp Estimated Cost: 55 Rate per Hour	Edit Task out Title,	Outputs" win Estimated Cor O de Sue Statue: Open © Core of See Statue: Open of See Sta	dow. npleti
Sele DrO' Dat Tasks "Task 1: Detail Perso Outpu Sele Can Add	ecting the < <b>Edit&gt;</b> link widers can add output te, <b>Output Description</b> Test Task is Narrative: Test Task Topic: trest Task is <u>a Output Title</u> East ecting < <b>Save&gt;</b> allows i con to delete the ou a/Edit Task Outputs	in the <b>Outputs</b> section is to current Work Pla servent Work Pla servent Work Pla servent Output Preserved a Personnet asted Completion Date Output Description FA providers to save for tput from current Work Estimated	on opens the n by specify mated Hours Estimated Hours o the outputs ork Plan.	e "Add/E ing Outp Estimated Cost 53 Rate per Heur	ent Work	Outputs" win Estimated Cor O Ald Date Status: Open Oracle (Cort Status Status: Open Core (Cort Status Status: Open Core (	he tra
Sele Drov Dat Tasks Tasks Perso Outpu Sele Can Ado	ecting the < <b>Edit&gt;</b> link viders can add output ee, <b>Output Description</b> Test Task is Narrative Test Task rest Task is Narrative Test Task reper vits <u>gouput Title</u> ecting < <b>Save&gt;</b> allows icon to delete the ou d/Edit Task Outputs	in the <b>Outputs</b> section is to current Work Pla servent Work Pla servent Date: 0/31/0231-11/23/022 Eff servennet as Personnet as Personnet ouput Description TA providers to save of tput from current Woo Estimated completion Date Ouput Description	on opens the n by specify mated Hours 2 the outputs ork Plan.	e "Add/E ing Outp Estimated Cost: 53 Rate per Hour	ent Work	Outputs" win Estimated Cor Ovie two Status Open      Ovie two Gest Status      Gest Status      Gest Status      Gest Status      Gest Status      Gest Status      Gest Gest Status      Gest Gest Status      Gest Gest Status      Gest Gest Status      Gest Gest Status      Gest Gest Status      Gest Gest Status      Gest	he tra



#### C14. Grantee | Associate Organization Groups

Us	User Role: Grantee User Menu Option: Q Manage Work Plans					
<b>Pu</b> Te	<b>Purpose:</b> Allow TA Provider Users to manage the list organization groups that will benefit from the Technical Assistance described by the Work Plans.					
V	<ul> <li>Complete the following steps to associate and r</li> </ul>	nanage organization groups:				
1	Follow the steps provided in Section C1 to search in the Actions column to navigate to the <b>"Manage</b>	for a Work Plan. Then, select the pencil icon 🖍 Work Plan" page.				
2	Select the <b>Organizations</b> tab. Then, select the Expa entered in the <b>Tasks</b> tab will be displayed here so groups and individual organizations.	nd icon for the desired task. <b>NOTE</b> : All the tasks TA providers can associate assisted organization				
	Assignments Scope People/OBLis Tasks Organizations Final Organizations Assisted	xials Documents Measures Outcomes History				
	Task 1: Test Task Organization Groups Individual Organizations Assisted No Results Found	gf tist © Add Cryseiation				
3	Select < <b>Edit&gt;</b> next to "Organization Groups" in the task to open the " <b>Edit Organization Group"</b> windo	e Organization Assisted section for the desired W.				
	▼Task 1: Test Task Organization Groups Individual Organizations Assisted No Results Found	G for O Ant Operation				
3	Select the applicable organization groups and sele	ect <b><save></save></b> to add them to current Work Plan.				
	Edit Organization Group Select the available Groups you wish to choose for the Organizations.	×				
	Program:     Filter Programs       Select all     Unselect all       EHV     HOME-ARP       PDR     Border Community       Section 4	Cancel 🖬 Save				
	Select all> and <unselect all=""> allows TA provider respectively.</unselect>	s to select and unselect all organization groups				



#### C15. Grantee | Associate Individual Organizations

Us	<b>er Role:</b> Grantee User	Menu Option: Q Manage Work Plans				
<b>Pu</b> de	<b>Purpose:</b> Allow TA Provider Users to manage the list organizations assisted by the Technical Assistance described by the Work Plan.					
2	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 <b>r</b> in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.					
2 Select the <b>Organizations</b> tab. Then, select the Expand icon for the desired task. <b>NOTE</b> : All the entered in <b>Tasks</b> tab will be displayed here so TA providers can associate assisted organizations groups and individual organizations.						
	Organizations Assisted	Bit See O And Crymonations				
3	Selecting <add organizations=""> opens the "Add Organizations" opens the "Add Organizations Assisted Task 1: Test Task Organization Groups Individual Organizations Assisted No Results Found</add>	anization" 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</search>					



ser Role: Grantee User			Menu Option: <b>Q</b> Manage Work Plans								
select < <b>Save&gt;</b> to add organizations to current Work Plan.											
Add C	Organizations										
Select t	the available Organiz	ations you wish	to associate	e with this Work	kplan Task						
Sea	arch Criteria 🗸										
Orga Assis	anization sted:	Enter					Program:	Enter			
Field	Office:	Enter					Office:	Enter			
Regi	on:	Enter					Asst Sec Office:	Enter			
DUN	IS Number:	Enter					Unique Entity Identifier:	Enter			
					F	leset	Search				
	Organization       Assisted       %WALTER RILEY       DAVIS SENIOR       COMPLEX CORP	Program	Sec Office	Office           Multifamily	Field Office	\$ ATE	<b>Region</b> Region V - Illinois Indiana Michigar	↓ Ninnesota Ohio Wisconsin	<b>State</b> WI	<b>DUNS</b> 878155402	UEI RT9EPFI
	10 ORCHARD STRFFT HDF	Project Based	HSG	Multifamily	NEW YORK	SO	Region II - New York Ne	ew Jersey	NY	605737845	LEYSDK
Asso <b>Orga</b>	ciated indiv nizations A	vidual ora <b>ssisted</b> se	ganizat ection	ions are in grid.	display	ed ur	nder the <b>Orga</b>	anizations tab in	n the I	ndividua	I
Indi Org	vidual anizations Assisted	Organization A %WALTER RILEY CORP	ssisted 7 DAVIS SENIO	R COMPLEX Sec 202	Asst Sec Office tion HSG	<b>Offic</b> Multi	e Field Office Fifamily ILLINOIS STATE - OFFIC	tegion State DUNS Action WI 878155402	s Orga	Add nizations	
Seleo from	cting the tra current W	ash can i ork Plan	con in task.	the Acti	ons colu	ımn a	allows TA pro	oviders to delet	e the	organiza	tion
NOT of th	<b>NOTE</b> : TA providers can follow the steps provided in <b>C14 – Associate Organization Groups</b> section of this document to add Organization Groups and Organizations to all tasks under current Work										

### C16. Grantee | Manage Financials

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



Us	<b>ser Role:</b> Grantee User		Menu Option: Q 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 <b>"Manage Work Plan"</b> page.							
2	Select the <b>Financials</b> tal for the current Work PI	select the <b>Financials</b> tab. The <b>Overall</b> section allows TA providers to view all financial information or the current Work Plan.						
	Assignments Scope People/	OBLIs Tasks Organizations Financial	s Documents Measures Outcomes	History				
	Financials							
	Overall	Line Item	Amount					
		Approved Work Plan Budget	\$107,663.00					
		Proposed Work Plan Budget	\$107,663.00					
		Original Work Plan Budget	\$165,875.00					
		Labor Budget	\$37,488.07					
		Travel Budget	\$0.00					
		Other Budget Line Item Costs + Travel	\$70,174.93	1				
		Total Funds Drawn	\$86,406.99					
		Program Funds Drawn	\$86,406.99					
		Program Income Drawn	\$0.00					
		Program Income Received	\$0.00					
		Total Funds Expended	\$86,406.99					
		Match Contributed	\$0.00					
		Matching Funds	\$0.00					
		Non-Matching Funds	\$0.00					
	Funding Sources	No Results Found		(g" Edit				
	Drawdown Block	HUD Block Drawdown:	No					



User Role: Grantee User			Menu Option: Q Manage Work Plans		
lf ₩ Se	one or more Fund /ork Plan from ea ources section.	ing Sources were specified in the gr ich funding source can be specifi	ant's Action Plan, the amount al ed using the <b><edit></edit></b> link in the	located for the Funding	
	Assignments Scope Financials	People/OBLIs Tasks Organizations Financi	als Documents Measures Outcomes	History	
	Overall	Line Mann	A		
	Overall	Line item	Amount		
		Approved Work Plan Budget	\$107,663.00		
		Original Work Plan Budget	\$107,003.00		
		Labor Budget	\$105,675.00		
		Travel Budget	\$0.00		
		Other Budget Line Item Costs + Travel	\$70,174,93		
		Total Funds Drawn	\$86,406,99		
		Program Funds Drawn	\$86,406.99		
		Program Income Drawn	\$0.00		
		Program Income Received	\$0.00		
		Total Funds Expended	\$86,406.99		
		Match Contributed	\$0.00		
		Matching Funds	\$0.00		
		Non-Matching Funds	\$0.00		
	Funding Sources	No Results Found	[	[₽ <sup>*</sup> Edit	
	Drawdown Block	HUD Block Drawdown:	No		
з <b>D</b> Н	<b>rawdown Block</b> s UD users.	ection allows TA providers to vie	w when a block is set for curre	ent Work Plan by	

#### C17. Grantee | Manage Documents

Us	s <b>er Role:</b> Grantee User	Menu Option: <b>Q</b> Manage Work Plans				
<b>Pu</b> dc	<b>Purpose:</b> Allow TA Provider Users to add documents to, view/download documents, or remove documents from a Work Plan.					
Ľ	Complete the following steps to manage documents:					
1	Follow the steps provided in Section C1 to search for in the Actions column to navigate to the <b>"Manage V</b>	or a Work Plan. Then, select the pencil icon 🗹 Nork Plan" page.				
2	The <b>Documents</b> tab allows TA providers to add an < <b>Add Document&gt;</b> allows TA providers to add docun	y documents to current Work Plan. Selecting nents.				
	Note: The file size limit is 3MB. Valid file extensions .csv, .ppt, .pptx, and .pdf.	are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx,				



Role: Gra	antee U	ser				M	enu Option	: <b>Q</b> Ma	anage W	ork Plan
Assignments Scope People/OBLIs Tasks Organizations F		Financ	cials	Documents	Measures	Outcomes	History			
Supporting The file size limit Name	Supporting Documents 3 The file size limit is 3MB, Valid file extensions are: .pngglf, .jpgjpeg, .doc, .docx, .xls, .xlsx, .esv, .ppt, .pptx, and . Name					.pdf.	Date	Туре	Uploaded By	Add Document
ICF-C-19-006 -	006 LSHR J&K Tri	aining & Webinars_Versior	1 2_TA Portal_06	.15.2020.pdf			06/15/202	0 PDF	Cindy Choi	0
ICF-C-19-006 -	006 LSHR J&K Tri	aining & Webinars_Versior	1_TA Portal_01.	14.2020.pdf			01/14/2020	D PDF	Cindy Choi	0
Tasking email.p	df						01/14/2020	D PDF	Cindy Choi	0
Selecting t	he eye i	con in the	Actions	; column al <sup>ı</sup>	lows	use	rs to view s	upport	ing docu	ments.

the trash can icon in the Actions column allows users to delete the specified supporting document.

#### C18. Grantee | Manage Measures

<b>User Role:</b> Grantee U	Jser		Menu Option: <b>Q</b>	Manage Work Pla	ans
Purpose: Allow TA P	rovider Users to	add measures to	a Work Plan.		
Complete the t	following steps t	o manage measur	es:		
1 Follow the steps in the Actions col	provided in Sect lumn to navigate	ion C1 to search for the <b>"Manage V</b> ariation of the "Manage Variation of the the second of the secon	or a Work Plan. Th <b>Vork Plan"</b> page.	en, select the pe	ncil icon 🗹
2 The <b>Measures</b> tak	b allows TA provi	iders to add propo	sed accomplishme	ents to current W	ork Plan.
Assignments Scope	People/OBLIs Tasks	Organizations Finance	ials Documents Meas	sures Outcomes His	story
Proposed Accomplishm	nents Performance Meas	ure	Proposed To	tal 🕑 🕫	Edit
	# of community prog	grams supported			
	# of in-person engage	gements/trainings			
	# Needs assessmen	ts completed			
	# of organizations so	erved			
	# hours				
3 Selecting < <b>Edit&gt;</b> specify performa	opens the " <b>Edit</b> nce measures.	Accomplishment	Performances" pag	ge allowing TA pr	roviders to
Edit Accomplishmer	nt Performances				×
Performance Measure		Proposed Total			
# of community programs	supported	Total			
# of in-person engagement	nts/trainings	Total			
# Needs assessments con	mpleted	Total			
# of organizations served		Total			
# hours		Total			
				Cancel 🕞 Sav	e
					_



User Role: Grantee User	Menu Option: Q Manage Work Plans
Selecting < <b>Save&gt;</b> saves the performance measures s	specified in the window and provides a success
message.	

# C19. Grantee | Manage Learning Objectives and Outcomes

User Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans
Purpose: Allow TA Provider Users to manag	e outcomes and learning objectives for a Work Plan.
Complete the following steps to mana	age learning objectives and outcomes:
Follow the steps provided in Section C1 in the Actions column to navigate to the	to search for a Work Plan. Then, select the pencil icon 🗹 "Manage Work Plan" page.
2 Select the Outcomes tab. Then, select <ade #1:="" #2:="" &="" 1:="" applicable="" assignments="" by="" category="" category<="" found="" hud="" improved="" learning="" no="" not="" objectives="" oblis="" orga="" outcome="" outcomes="" people="" results="" scope="" tails="" task="" test="" th="" •=""><th>d Objective&gt;. nizations Frencish Documents Measures Outcome History  Performance  Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance P</th></ade>	d Objective>. nizations Frencish Documents Measures Outcome History  Performance  Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance Performance P
3 Selecting <b><add objective=""></add></b> allows TA p <b>Objective</b> " page. Add Learning Objective	providers to add an objective using the "Add Learning
Enter the values and click save.	
Objective: Enter Objective      A Description:	
TA providers can add an objective with o to current Work Plan.	Cancel Save



Us	<b>er Role:</b> Grantee U	lser		Menu Option: <b>Q</b> Manage Wor	k Plans
4	The learning obje allows user to edi allows users to de	ectives t an exi elete ar	are displayed in a grid. Se sting learning objective. Sel existing learning objective	electing the pencil icon in the A ecting the trash can icon in the A e.	Actions column Actions column
	Learning Objectives	Objective	Description		Actions
		TA Portal Learning Objective #1	Be able to identify requirements for the Lead Safe Hou Grantees and their subrecipients.	sing Rule 24 CFR Part 35 Subparts J and K for CPD and ONAP	ă C'
		TA Portal Learning Objective #2	Be able to properly construct project files to capture a	tivities and applicability of the LSHR	ā C'

#### C20. Grantee | Manage Outcomes

Us	er Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans
Pu	<b>rpose:</b> Allow TA Provider Users to manage outco	omes for a Work Plan.
V	Complete the following steps to manage out	comes:
1	Follow the steps provided in Section C1 to sear in the Actions column to navigate to the <b>"Mana</b>	ch for a Work Plan. Then, select the pencil icon 🗷 age Work Plan" page.
2	Select the <b>Outcomes</b> tab. Then, in the <b>HUD Outc</b> task. The " <b>Edit HUD Outcomes for <task b="" name<=""></task></b>	<ul> <li>comes by Task section, select <edit> for the desired</edit></li> <li>" page is displayed.</li> </ul>
	Assignments Scope People/OBUs Tasks Organizations Outcomes & Objectives	Financials Documents Measures Outcomm History
	Learning Objectives No Results Found HUD Outcomes by Task	© Add Objective
	Task 1: Test Task       • HUD Outcome Category #1: Improved capacity to develo         • HUD Outcome Category #2: Improved capacity to design         • Not Applicable HUD Outcome Category	p plans and priorities informed by community needs and program/policy goals (If ten strategies that align with plans and priorities



Jser Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans			
Select the applicable outcomes and select <b><save< b=""></save<></b>	e> to save HUD outcomes for the current Work			
Plan.				
Edit HUD Outcomes for	×			
Select the options you wish to complete the outcomes on:				
HUD Outcome Category #1: Improved capacity to develop plans and priorities inform	ned by community needs and program/policy goals			
<ul> <li>A: Improved capacity to collect, analyze, and share data (e.g., improved data on populations served, program results or impacts, or community conditions)</li> <li>B: Improved capacity to gather and use resident and community input (e.g., implemented new strategies for identifying needs, for determining priorities and developing plans, or for measuring results of actions taken)</li> </ul>				
D 1D: Improved coordination and alignment with other community or regional plans (e and regional government agencies, service providers, or nonprofit organizations)	e.g., HUD plans aligned with plans of other HUD or federal programs, local			
HUD Outcome Category #2: Improved capacity to design strategies that align with r	plans and priorities			
<ul> <li>2A: Improved capacity to select programmatic strategies that address program or activities could most effectively address needs)</li> </ul>	policy goals and community needs (e.g., determined which eligible			
<ul> <li>2B: Improved capacity to design system-wide strategies that address community n coordinated place-based development to leverage neighborhood impacts)</li> </ul>	needs (e.g., designed innovative multi-disciplinary strategies, designed			
2C: Improved capacity to design effective partnerships or cross-jurisdictional relatical collaboration, established new or innovative partnerships, developed governance of collaboration.	ionships that address community needs (e.g., developed a framework for charters or memoranda of understanding)			
2D: Improved alignment of resources with program-, system- or community-wide g strategy, developed resource allocation processes to improve targeting of resource	goals (e.g., developed an investment plan to support a system-wide es to plan goals)			
HUD Outcome Category #3: Improved capacity to deliver projects, programs or syst	tems that address community needs			
3A: Improved staffing or organizational structure (e.g., revised job descriptions to r achieve greater efficiency or alignment)	reflect skills required to implement program, merged departments to			
□ 3R· Improved administrative processes or infrastructure (e.g., improved cost and p	articinant eligibility verification procedures instituted new policies and			
	Cancel 🖬 Save			

### C21. Grantee | Manage Surveys

Use	er Role: Grantee User Menu Option: Q Manage Work Plans							
Pur	Purpose: Allow TA Provider Users to add, edit, and delete surveys for a Work Plans.							
ď	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 <b>C</b> in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.							
2	Select the Surveys tab. Then, select <add survey=""> page. Note: Currently, the survey tab is only displa Auguments Scope Preparotic Taks Organizations Preside Surveys</add>	in the <b>Survey</b> section to open the " <b>Add Survey</b> " ayed for Direct TA Work Plans.						



Use	<b>r Role:</b> Grantee User			Menu Option: <b>Q</b> Manage Work I	Plans
3	On the <b>"Add Survey"</b> p Engagement Start Da provides a success me	bage, ate, a essage	TA providers can add nd Engagement End e.	Survey Name, Brief Description of Date. Selecting <b><save></save></b> saves the	TA Provided, survey and
	Add Survey				×
	Details				
	Survey Name	Ente	er Survey Name		
	* Brief Description of TA Provided	Ente	er Description of TA Provided		
	★ Engagement Start Date	<b></b>	10/10/2021		
	★ Engagement End Date	曲	10/10/2021		
				Cancel	B Save
4	Assignments Scope People Assignments Scope People Surveys * Survey: Example B	l to re	cipients. Tata Organizations Financials	Documenta Measures Outcomas Surreys	History Order Survey B Decision
5	Select the Expand icc Organizations section	on ne: s.	xt to the survey title	to display the survey Details, Ou	tcomes, and
	Assignments Scope Peo	ple/OBLIs	Tasks Organizations	inancials Documents Measures Outcomes	Surveys History
	Surveys				OAdd Survey
	▼Survey: Example				🖬 Delete
	Details Engager Descript	nent Start Date: ion of TA Provid	10/18/2021 Engagement End I ed:	ate: 10/22/2021	🛃 Edit Details
	Lorem Ip Outcomes No Re	sum sults found.			<b>F</b> Edit Outcomes
	Organizations No Re	sults found.			Add Organization
6	To edit a survey's deta	ails, se	elect < <b>Edit Details&gt;</b> to	open the <b>"Edit Survey"</b> page.	
	Assignments Scope People/C	IBLIs	Tasks Organizations Financials	Documents Measures Outcomes Surveys	History
	surveys				VADD SUIVEY
	* Survey: Example Details Determine  Determi	Start Date: 10/18/	2021 Engagement End Date: 10/22/	021	₫ Delete f Edit Details
	Outcomes No Results f	ound.		<b>IX</b> to	St Outcomes
	Organizations No Results f	ound.		0 0	D Add µnitation



	e User	Menu Opt	ion: <b>Q</b> Manage Work Plans	
Selecting < <b>Ed</b>	it Outcomes> under the O	utcomes section oper	is the <b>"Edit HUD Outcomes</b> "	for
Survey" page.				
Assignments Scop	People/OBLIs Tasks Organizations	Financials Documents	Measures Outcomes Surveys History	
Surveys			OAdd Survey	
▼Survey: Example			🖥 Defeta	
Details	Engagement Start Date: 10/18/2021 Eng Description of TA Provided: Lorem (psum	jagement End Date: 10/22/2021	😰 List Deus	
Outcomes	No Results found.		😭 Edit Outcomes	
Organizations	No Results found.		O Add Organization	
Select the ap	olicable outcomes. Then, se	elect < <b>Save&gt;</b> to save. <b>N</b>	<b>JOTE</b> : TA Providers only sele	ct fro
the outcome	s specified on the <b>Outcor</b>	<b>nes</b> tab. If a desired	d outcome is missing, upda	ate th
outcomes sel	ected for the Work Plan or	the Outcomes tab		
outcomes ser		The outcomes tub.		
Edit HUD Outcome	es for Survey		×	
Select the options y	you wish to complete the outcomes on:			
Initialization				
HUD Outcome Cat	egory #1: Improved capacity to develop plans and	d priorities informed by community nee	ds and program/policy goals	
1A: Improved     HUD Outcome Cat	i capacity to collect, analyze, and share data (e.g., in	nproved data on populations served, progr	am results or impacts, or community conditions)	
2A: Improved	I capacity to select programmatic strategies that add	dress program or policy goals and commun	nity needs (e.g., determined which eligible	
activities cou	Id most effectively address needs)			
			Cancel 🖬 Save	
			an and displayed in a solid	
The task nan	ne, category, outcome, ar	nd outcome descripti	on are displayed in a grid	in th
The task nan Outcomes se	ne, category, outcome, ar ction on the <b>Surveys</b> tab	nd outcome descripti once an outcome is	on are displayed in a grid selected for a survey. NOT	in tl E: Tl
The task nan Outcomes se outcome des	ne, category, outcome, ar ction on the <b>Surveys</b> tab cription is prepopulated w	nd outcome descripti once an outcome is vith the description pl	on are displayed in a grid selected for a survey. NOT rovided for the task's outco	in th E: Th
The task nan Outcomes se outcome des the Outcome	ne, category, outcome, ar ction on the <b>Surveys</b> tab cription is prepopulated w s tab.	nd outcome descripti once an outcome is /ith the description pi	on are displayed in a grid selected for a survey. NOT rovided for the task's outco	in th E: Th
The task nan Outcomes se outcome des the Outcome <sub>Outcomes</sub>	ne, category, outcome, ar ction on the <b>Surveys</b> tab cription is prepopulated w s tab. Task Category	nd outcome descripti once an outcome is /ith the description pi	on are displayed in a grid selected for a survey. NOT rovided for the task's outco	in th E: Th
The task nan Outcomes se outcome des the Outcome <sup>Outcomes</sup>	ne, category, outcome, ar ction on the <b>Surveys</b> tab cription is prepopulated w s tab. Task <u>Category</u> Initialization HUD Outcome Category #1: Improved ca develop lage and relative informed the	nd outcome descripti once an outcome is /ith the description pr outcome	on are displayed in a grid selected for a survey. NOT rovided for the task's outco Description Actions	in th E: Th
The task nan Outcomes se outcome des the Outcome outcomes	ne, category, outcome, ar ction on the <b>Surveys</b> tab cription is prepopulated w s tab. Task Category Initialization HUD Outcome Category #1: Improved ca develop plans and priorities informed by community needs and program/policy go	nd outcome descripti once an outcome is vith the description pr <u>outcome</u>	on are displayed in a grid selected for a survey. NOT rovided for the task's outco <u>Description Actions</u> received, nity conditions	in th E: Th
The task nan Outcomes se outcome des the Outcome outcomes	ne, category, outcome, ar oction on the <b>Surveys</b> tab cription is prepopulated w s tab. Task Category Initialization HUD Outcome Category #1: Improved ca develop plans and priorities informed by community needs and program/policy go	nd outcome descripti once an outcome is vith the description pr outcome upacity to 1A: Improved capacity to collect, analy data (e.g., Improved data on populatio program results or impacts, or commu	on are displayed in a grid selected for a survey. NOT rovided for the task's outco Description Actions Tex, and share ns served, nity conditions)	in th E: Th ome c



Use	<b>r Role:</b> Grantee Us	ser				Menu	Option:	<b>Q</b> Manag	e Work	Plans	
8	Selecting <b><add< b=""> Organization" pa</add<></b>	<b>Organi</b> z ge.	ation> un	der the	Organ	zation	<b>s</b> sectio	n opens I	up the	"Add Su	irvey
	Add Survey Organization	n								×	
	<b>*</b> Su	rvey Type:	Organization Assis	sted		× •					
	*F	irst Name:	Enter First Name .								
	*Last Name: Enter Last Name										
	<b>*Email:</b> Enter Email										
	Org	ganization:	Search Organizati	on							
									Cancel	B Save	
	Organizations	ame org ohn Doe USE the	anization Assisted	Email jdoe@doe.com	Survey Ty Organizati sh can	pe on Assisted	status r Not Sent	ions colur	nn to e	• Add rganization dit and de	elete
	survey organizati	ons res	pectively.								
9	Users can select	<send s<="" th=""><th>Survey&gt; bu</th><th>tton to se</th><th>end the</th><th>e surve</th><th>ey for spe</th><th>ecified org</th><th>anizatio</th><th>on(s).</th><th></th></send>	Survey> bu	tton to se	end the	e surve	ey for spe	ecified org	anizatio	on(s).	
	Assignments Scope	People/OBLIs	Tasks	Organizations	Financials	Documents	Measures	Outcomes	Surveys	History	
	Surveys									Add Survey	
	▼ Survey: Example Details	Engagement Start D	ste: 10/18/2021	Engagement Enc	i Date: 10/22/2021				Tek	ete Send Survey	
	Outcomes Organizations	Lorem Ipsum No Results found. Name Or Jane Doe	ganization Assisted	Email JaneDoe@example.com	Si	rvey Type ganization Assisted	Status Not Sent	Date/Time Sent	Actions	Edit Outcomes Add Organization	
									L)		
10	TA providers can	view tł	ne status of	f the surv	ey unc	ler <b>Org</b>	anizatio	<b>ns</b> section	in the S	Survey tal	b.
	Organizations	Name	Organization Assiste	d Email	Survey 1	уре	Status	Da	te/Time Sent	Actions	
		John Doe		jdoe@doe.con	n Organiza	tion Assisted	Survey Reques	st In Progress 10/	10/2021	C	



#### C22. Grantee and HUD | View History

Us	ser Role: Grantee User				Menu Optio	<b>n: Q</b> Manage Work Plar	IS
Pu	Irpose: Allow TA Provic	ler and HUD u	sers	to view hi	story of a Wor	k Plan.	
۲	Complete the follow	wing steps to	view	history of	a Work Plan:		
1	Follow the steps provi in the Actions column	ided in Section to navigate to	n C1 t o the	to search <b>"Manage</b>	for a Work Pla <b>Work Plan"</b> pa	n. Then, select the penc ge.	cil icon 🗹
2	Select the <b>History</b> tab.						
_	Assignments Scope People/C	DBLIs Tasks Or	ganizations	Financials	Documents Measures	Outcomes Surveys History	
	History						
	history						
	Review History	Status Date	User	User Con	ments	Compare Versions	
		Approved (Modified) 07/20/20	021				
	History Review History					Compare Versions	
	·····,	Status	Date	User	User Comments		
		Resubmit When Ready	59/13/2021	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 <b>History</b> tab inc <b>Recommendation Cor</b> of who added the cor	ludes a secti <b>nments</b> as we nments.	ion f II as <b>(</b>	for Comr General C	nents. TA pro omments along	widers can view both s with Date and User info	<b>Review</b> ormation
4	The <b>History</b> tab inc <b>Recommendation Cor</b> of who added the com	Iudes a secti nments as we nments.	ion f II as <b>(</b>	For Comr General C	nents. TA pro	widers can view both with Date and User info	<b>Review</b> ormation
4	The History tab inc Recommendation Cor of who added the con Comments	ludes a secti nments as we nments. <u>Comment Type</u> Recommendation Comm	ion f II as <b>(</b>	Comments Review Recommend	nents. TA pro comments along Date ation comment 09/21/2	uviders can view both s with Date and User info user 121 TO15F0First T015F0Last	n <b>Review</b> ormation
4	The History tab inc Recommendation Cor of who added the con <sub>Comments</sub>	ludes a section nments as we nments. <u>Comment Type</u> <u>Recommentation Comments</u> <u>Becommentation Comments</u>	ion f II as <b>(</b> ents	Comments Comments Comments Ceneral Comment Ceneral Comment Ceneral Comment Ceneral Comment Ceneral Comment Centry Transco	nents. TA pro pomments along ation comment 09/21/2 09/21/2 09/21/2	User User 1 T015F0First T015F0Last 1 T015F0First T015F0Last 1 T015F0First T015F0Last	<b>Review</b> ormation



### D. Grantee and HUD | View Work Plan

User Role: Grantee	and HUD User		Menu Option: <b>Q</b> Manage Work Plans		
Purpose: Allow TA Providers and HUD users to view a Work Plans.					
Complete the	e following steps to	view a Work Plai	n:		
1 Follow the step	s provided in Section	on C1 to search fo	or a Work Plan. Then, select the pencil icon 🗹 in <b>rk Plan</b> ″ page.		
the Actions colu	umn to navigate to	the <b>"Manage Wo</b>			
2 Selecting the	Con in Actions col	umn will open the	e "View Work Plan" page.		
Work Plan		Rep Period of Performace Work Plan Type	Status Last Updated By Date Submitted Status Actions		
Number		00/31/221 - 09/30/223 Administration	09/27/2021 Open 2 0		
Test-M/H-0001		Mint Chrono into into into into into into into i	Status 10 Actions		
Scroll down the the top right co <b>View Work Plar</b>	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.				
TA Provider Name:	Minnesota Housing	Work Plan Number:	T-12-NN-27-0023 - MHP-NSP-2011-		
Last Updated Date:	Partnership	Work Plan Title:	03-10		
Grant Number:	12/22/2014	TA Type:	TA - Direct		
Appropriation Code:	T-12-NN-27-0023	Work Plan Type:	TA - Direct		
Project Number:	86x0344T	Performance Period Star	2Date: 06/15/2013		
Project Title:	NSP12	Performance Period End	Date: 10/31/2014		
Grantee Program:	NSP	Approved Work Plan Bud	jet: \$17,817.73		
Work Plan Status:	Closed	Work Plan Budget:	\$17,817.73		
Scope of Work          *Scope			olorado Housing Authority staff.		
Description       The MHP TA Consortium will provide both remote and on-site TA to Weld County Colorado Housing Authority			* and these tasks represent a continuation of our past work with		
The MHP TA Consortium has been providing TA to Weld County for almost two years and these tasks represent			ally obligates/expends its NSP3 funds in accordance with approved		
them under our 2009 NSP TA award. TheTA will be almed at ensuring the grantee fully obligates/expends its NSP3 activities by the timelines indicated in the NSP3 Notice and subsequent NSP policy guides. Weld County			policy guides. Weld County Housing Authority will contract with its		
properties will be transferred to the City of Fort Lupton Housing Authority to meet its 25% set-aside requirem			d properties and new construction on a sixth. Two of the renovated		
Housing Authority and the City of Fort Lupton will work in partnership to market the completed properties to ex-			ts 25% set-add eradiment using MSP3 fund. Weld County		
			e completed properties to eligible owner-occupants.		

### E. Grantee and HUD | Download Work Plan

User Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans		
Purpose: Allow TA Provider and HUD users to downloa	d a Work Plan.		
Complete the following steps to download a Work Plan:			
Follow the steps provided in Section C1 to search for in the Actions column to navigate to the <b>"Manage V</b>	or a Work Plan. Then, select the pencil icon 🗹 Nork Plan" page.		



User Role: Grantee User				Menu Option: <b>Q</b> Manage Work Plans		
2	Select <b><download></download></b> download the Work	in the second Plan in a PDF fo	ary navigation m ormat.	enu on the <b>"Manag</b>	e Work Plan"	page to
	🧰 Manage Work Plan			Back Download     Add Comments	🛠 Validate Plan 🛛 🛠 Submit Plan	_
	TA Provider Name: Last Updated Date:	07/20/2021	Work Plan Number: Work Plan Title:		🖬 Edit	

# F. Grantee and HUD | Add Comments to Work Plan

User Role: Grantee User		Menu Option: <b>Q</b> Manage Work Plans				
Pu	<b>Purpose:</b> Allow TA Provider and HUD users to add comments to a Work Plan.					
2	Complete the followi	ng steps to add comment to	o 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 <b>"Manage Work Plan"</b> page.					
2	2 Select <b><add comments=""></add></b> on the " <b>Manage Work Plan"</b> page.					
	CPD   Disaster Recovery Grant Reporting System			celly Margaret Aj		
	🧰 Manage Work Pla	in	<ul> <li>Back Download Add Comments Validate Plan VS</li> </ul>	ubmit Plan		
	TA Provider Name: Last Updated Date: Grant Number:	Work Plan Number: 07/20/2021 Work Plan Title: TA Type:	TA - Direct	[ <b>2</b> <sup>*</sup> Edit		
	The " <b>Add Work Plan Comments"</b> page will open. <b>Note</b> : TA providers can only add General Comments. HUD users can add Review Recommendations as well as General Comments.					
	Add Work Plan Comments			×		
	Use the general comments option, unless you are a GTM providing approval recommendations.			*		
	* Comment Type: O Review Recommendation					
	* Comments:	General Comment     Enter Comments				
			Cancel	Submit		



### G. Grantee and HUD | Validate Work Plan

Use	er Role: Grantee User	Menu Option: <b>Q</b> Manage Work Plans		
Pur	Purpose: Allow TA Provider and HUD users to validate a Work Plans.			
2	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 $\square$ in the Actions column to navigate to the <b>"Manage Work Plan"</b> page.			
2	Select <b><validate plan=""></validate></b> in the secondary navigation menu on " <b>Manage Work Plan"</b> page to validate the Work Plan.			
	🚹 Disaster Recovery Grant Reporting System			
	🟛 Manage Work Plan	< Back 🖺 Download 🙍 Add Comments 🔗 Validate Plan 🕏 Submit Plan		
	TA Provider Name:     Work Plan Nun       Last Updated Date:     07/20/2021     Work Plan Title       Grant Number:     TA Type:	iber: 2 Edit : TA - Direct		
	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.			
	Enter a response in the SCOPE description field.     A Warnings Fund The Notiving issues area fround by the submathed data validation checks and may need attention     1. Add is take on table? Checkpoint and Personnel to this workpain.     2. Enter at least one output for following Tasks. Initialization	×		

### H. Grantee | Submit Work Plan

Us	User Role: Grantee User Menu Option: Q Manage Work Plans				
Pu	Purpose: Allow TA Providers to submit a Work Plan.				
2	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 <b>"Manage Work Plan"</b> page.				
2	Select <b><submit plan=""></submit></b> in the secondary navigation menu on the " <b>Manage Work Plan"</b> page to submit the Work Plan.				
	CPD   Disaster Recovery Grant Reporting System				
	📠 Manage Work Plan	Back Download Add Comments Validate Plan     Submit Plan			
	TA Provider Name:Work PlanLast Updated Date:07/20/2021Work PlanGrant Number:TA Type:	Number: C Edit Title: TA - Direct			



Us	Jser Role: Grantee User		Menu Option: <b>Q</b> Manage Work Plans		
	<b>NOTE</b> : TA Providers must resolve all the errors prior to submitting the Work Plan. An ale displayed prior to submission when warnings are found. TA Providers can review the warnings proceed accordingly.				
		Warnings found	×		
		Validation of this work plan succes However, one or more warnings we found that may need your attentio Would you like to go back and revi these warnings before submitting work plan?	eeded. were ion. view g your		
		Continue Subm Review Wa	mission 'arnings		
<ul> <li>4 TA Providers will have the option to submit the Work Plan using following Modification, Submit Amendment.</li> <li>Users can also use this window to "Cancel Work Plan," "Close Work Plan," or plac "On-Hold."</li> </ul>			e Work Plan using following options: Subm lan," "Close Work Plan," or place the Work Pla	it n	
	Submit Work Plan		×		
	* Work Plan Status:	✓ Select One Submit Modification Submit Amendment Cancel Work Plan Close Work Plan On-Hold			
			Cancel Submit		
	The System sends an er Plan.	nail to the CPD Rep and the	e Work Plan creator upon submitting the Wor	k	

### 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.