



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

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Chapter 17: Technical Assistance Work Plans

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

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

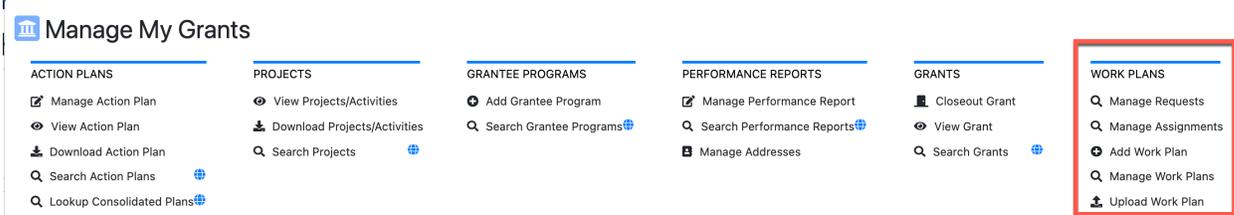
Grantee Users

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

A. Manage My Grants Module Access

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

A1. Grantee | User Access

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



B. Add Work Plans

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

B1. Grantee | Add Work Plan

User Role: Grantee User	Menu Option: ➕ Add Work Plan
Purpose: Allow TA Providers to add a DRGR Work Plan.	
✓ Complete the following steps to add a DRGR Work Plan:	
<ol style="list-style-type: none"> Navigate to the Manage My Grants module, or icon. Locate the Action Plan menu as described in Section A1 above. Select <Add Work Plan>. The “Add TA Work Plan” page will load. 	
<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> </div>	
<ol style="list-style-type: none"> After specifying requested information marked with asterisks and selecting <Save> on the “Add Work Plan” page, the “Manage Work Plan” page is displayed. The “New TA Work Plan has been created successfully” message appears at the top of the page. <p>The “Manage Work Plan” page header includes TA Provider Name, Last Updated Date, Grant Number, Appropriation Code, Project Number, Project Title, Grantee Program, Work Plan Status, Work Plan Number, Work Plan Title, TA Type, Work Plan Type, Performance Period Start Date, Performance Period End Date, Approved Work Plan Budget, and Proposed Work Plan Budget.</p> <p>Following tabs are available on the “Manage Work Plan” page: Assignments, Scope, People/OBLs, Tasks, Organizations, Financials, Documents, Measures, Outcomes, and History.</p>	<p>TIP: If the DRGR System displays errors, be sure that:</p> <ul style="list-style-type: none"> all mandatory fields are complete; and sufficient funds are available to support the work plan budget.



User Role: Grantee User
Menu Option: Add Work Plan

Add Work Plan

Details

* Grant Number:

* TA Provider:

* Project:

Grantee Program:

* Work Plan Number:

* Work Plan Title:

* Work Plan (Activity) Type:

* TA Type (Activity Category):

* Performance Period Start Date:

* Performance Period End Date:

Cancel Save

Manage Work Plan

[Back](#)
[Download](#)
[Add Comments](#)
[Validate Plan](#)
[Submit Plan](#)

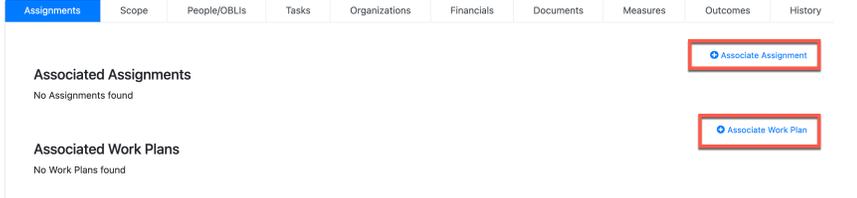
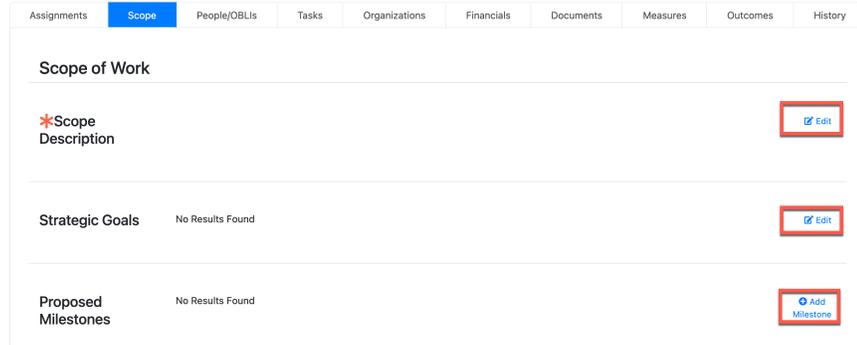
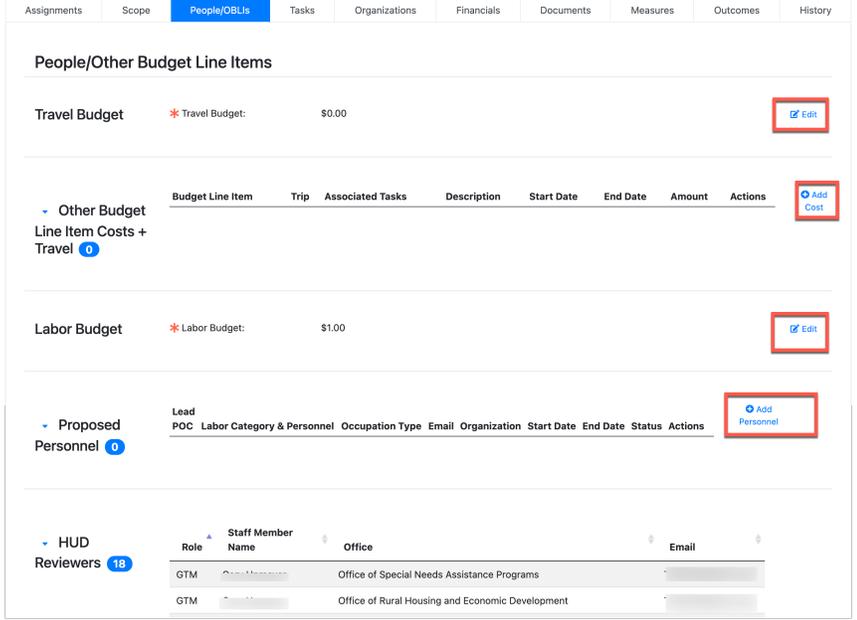
TA Provider Name: <input type="text"/>	Work Plan Number: WP-015 Edit
Last Updated Date: 06/29/2021	Work Plan Title: WP Title
Grant Number: <input type="text"/>	TA Type: PFS-Capacity
Appropriation Code: <input type="text"/>	Work Plan Type: PFS - Capacity assessment
Project Number: Administration	Performance Period Start Date: 01/02/2020
Project Title: CPD, Housing, Public Housing, CC	Performance Period End Date: 01/02/2020
Grantee Program:	Approved Work Plan Budget:
Work Plan Status: Open	Proposed Work Plan Budget:

Assignments	Scope	People/OBLIs	Tasks	Organizations	Financials	Documents	Measures	Outcomes	History
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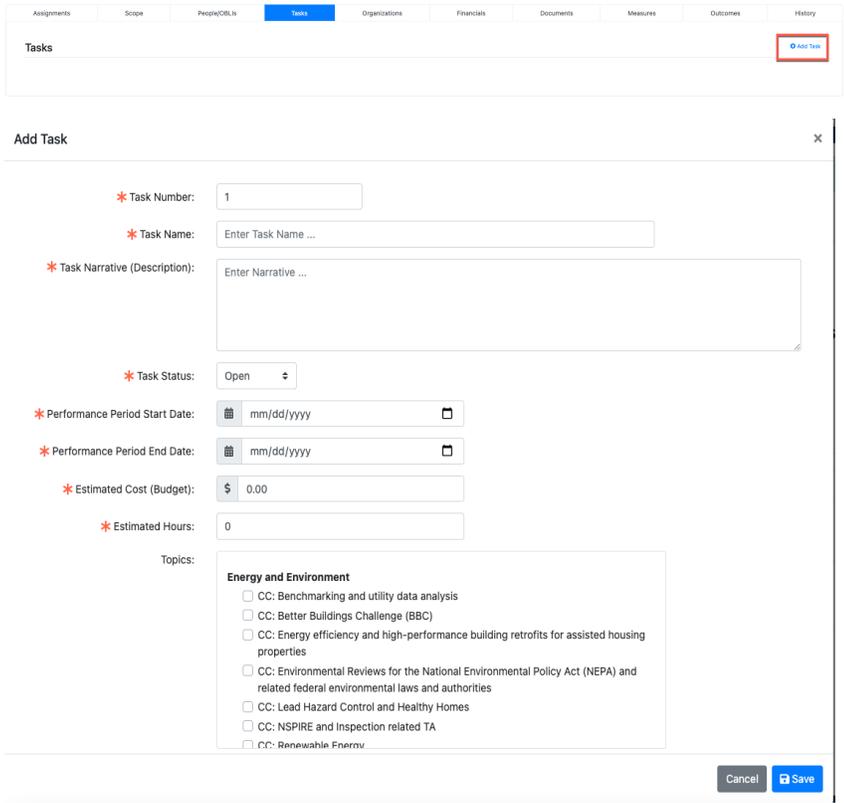
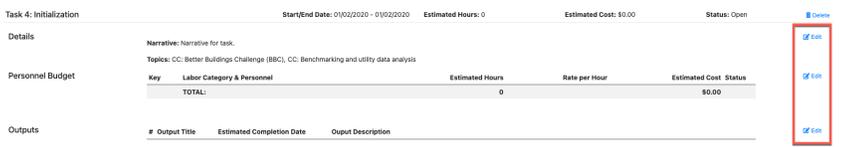
Refer to the table below to complete the Work Plan using available tabs.



Tabs to Complete Work Plan

Tab	Notes
<p>Assignments</p>	<p>The System allows TA Provider to associate assignments and other work plans.</p> 
<p>Scope</p>	<p>The System allows TA Provider to add Scope, Strategic Goals, Proposed Milestones.</p> 
<p>People/OBLIs</p>	<p>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.</p> 



<p>Tasks</p>	<p>The System allows TA Provider to add tasks and related information from this tab.</p>  <p>TA Providers can expand the task after it is created by clicking the blue arrow to complete information for Details, Personnel, and Outputs.</p> 
<p>Organizations</p>	<p>The System allows TA Provider to add Organization Groups and Individual Organizations Assisted for each task from this tab.</p> 
<p>Financials</p>	<p>The System provides Overall Financials in this tab.</p>



Documents	<p>The System allows TA Provider to add supporting documents from this tab.</p>
Measures	<p>The System allows TA Provider to specify proposed accomplishments from this tab.</p>
Outcomes	<p>The System allows TA Provider to add Outcomes & Objectives from this tab.</p>
Survey	<p>Where applicable, the System allows users to set up surveys from this tab.</p>
History	<p>TA Providers can view the History of the Work Plan and compare previous versions using this tab.</p>



C. Manage Work Plans

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

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

C1. Grantee | Manage Work Plans

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to manage a DRGR Work Plan.	
Complete the following steps to add a DRGR Work Plan:	
<ol style="list-style-type: none"> Navigate to the Manage My Grants module or icon. Locate the Action Plan menu as described in Section A1 above. Select <Manage Work Plans>. The “Manage Work Plans” page will load. <div style="margin-top: 10px;"> <p>The screenshot shows the 'Manage My Grants' dashboard with six main categories: ACTION PLANS, PROJECTS, GRANTEE PROGRAMS, PERFORMANCE REPORTS, GRANTS, and WORK PLANS. Under the WORK PLANS category, the 'Manage Work Plans' option is highlighted with a red rectangular box.</p> </div> TA Providers can search for Work Plans using following criteria: Work Plan Number, Work Plan Status, TA Provider, Primary CPD Representative, Lead POC, Assignment ID, Work Plan Type, Grant Number, Program Office Reviewer, and Organization Assisted. Additional search criteria are revealed by clicking on <Show More Criteria>. 	



User Role: Grantee User

Menu Option: Manage Work Plans

Disaster Recovery Grant Reporting System Z-21-TA-VA-0011

Manage Work Plans

[Show Less Criteria](#)

Work Plan Number: <input type="text" value="Enter Work Plan Number ..."/>	Assignment ID: <input type="text" value="Enter Assignment Id ..."/>
Work Plan Status: <input type="text" value="Select Option"/>	Work Plan Type: <input type="text" value="Select Option"/>
TA Provider: <input type="text" value="ICF Incorporated"/>	Grant Number: <input type="text" value="Z-21-TA-VA-0011"/>
Primary CPD Representative: <input type="text" value="Enter Name ..."/>	Program Office Reviewer: <input type="text" value="Enter Name ..."/>
Lead POC: <input type="text" value="Enter Lead POC ..."/>	Organization Assisted: <input type="text" value="Enter Organization Assisted ..."/>
Program: <input type="text" value="Enter Program Name..."/>	Project Number: <input type="text" value="Enter Project Number ..."/>
Project Title: <input type="text" value="Enter Project Title ..."/>	Organization Assisted State: <input type="text" value="Select Option"/>
Period of Performance From: <input type="text" value="mm/dd/yyyy"/>	Period of Performance To: <input type="text" value="mm/dd/yyyy"/>
Organization Assisted HUD Region: <input type="text" value="Enter Region Office Name ..."/>	Field Office: <input type="text" value="Enter Field Office Name ..."/>
Survey Name: <input type="text" value="Enter Survey Name ..."/>	Supporting Document Name: <input type="text" value="Enter Supporting Document Name ..."/>
Supporting Document Type: <input type="text" value="Enter Supporting Document Type ..."/>	

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.

Search Results 9

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	Actions
			T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	🔗 👁
			T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	🔗 👁
			T047FOLast T047FOFirst	09/15/2021 - 12/31/2021		02/06/2022	T047FOLast T047FOFirst	02/03/2022	Approved	🔗 👁
			T047FOLast T047FOFirst	10/04/2021 - 09/30/2022		10/14/2021	T012FOLast T012FOFirst	10/07/2021	Approved	🔗 👁
	0011	Incorporated	T047FOLast T047FOFirst	10/05/2021 - 09/30/2022	Support	10/14/2021	T012FOLast T012FOFirst	10/07/2021	Approved	🔗 👁

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

Manage Work Plan

[← Back](#) [Download](#) [Add Comments](#) [Validate Plan](#) [Submit Plan](#)

TA Provider Name: <input type="text"/>	Work Plan Number: WP-015 🔗 Edit
Last Updated Date: 06/29/2021	Work Plan Title: WP Title
Grant Number: <input type="text"/>	TA Type: PFS-Capacity
Appropriation Code: <input type="text"/>	Work Plan Type: PFS - Capacity assessment
Project Number: Administration	Performance Period Start Date: 01/02/2020
Project Title: CPD, Housing, Public Housing, CC	Performance Period End Date: 01/02/2020
Grantee Program:	Approved Work Plan Budget:
Work Plan Status: Open	Proposed Work Plan Budget:

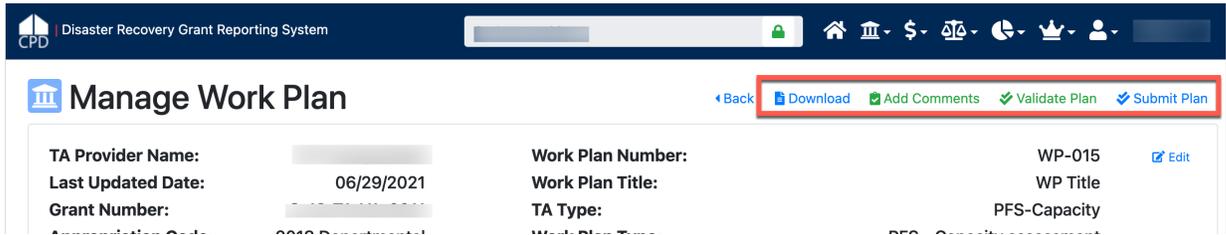
[Assignments](#) |
 [Scope](#) |
 [People/OBLIs](#) |
 [Tasks](#) |
 [Organizations](#) |
 [Financials](#) |
 [Documents](#) |
 [Measures](#) |
 [Outcomes](#) |
 [History](#)



User Role: Grantee User	Menu Option: Manage Work Plans
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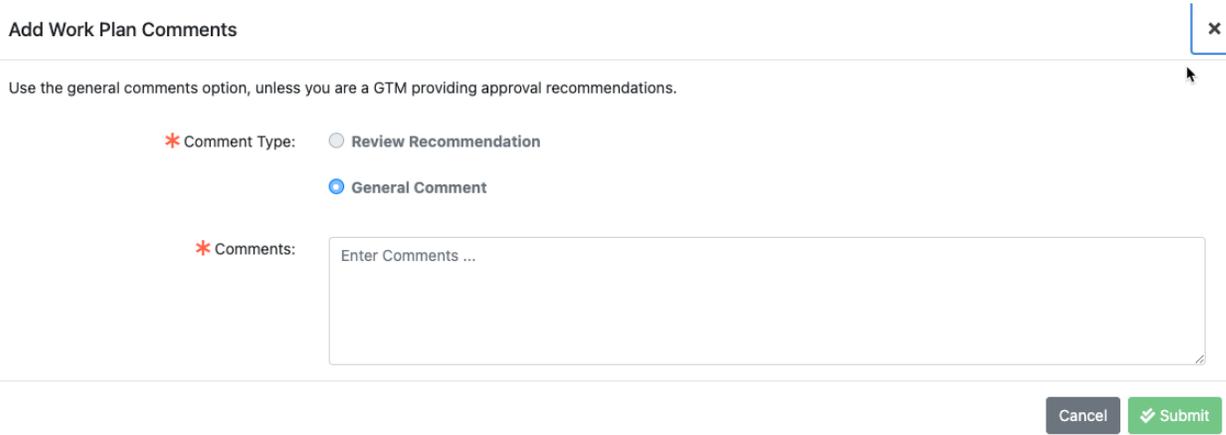
Refer to the Section B1 above to add/edit Work Plan information using each tab.

- 3 Secondary navigation available on the **“Manage Work Plan”** page allows Users to add comments, validate Work Plan, and Submit Work Plan for HUD Review.

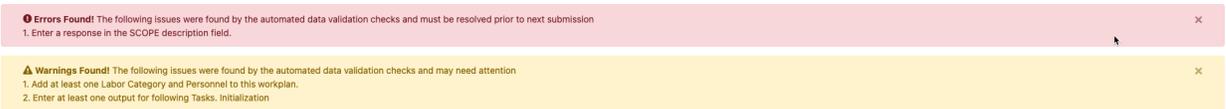


- 4 TA Providers can use the **<Download>** action on the **“Manage Work Plan”** page to download the Work Plan in a PDF format.

- 5 TA Providers can use the **<Add Comments>** action on the **“Manage Work Plan”** page to add Work Plan Comments.



- 6 TA Providers can use the **<Validate Plan>** action on **“Manage Work Plan”** page to validate the Work Plan and provide a list of Warnings and Errors.



- 7 TA Providers can use the **<Submit Plan>** action on the **“Manage Work Plan”** page to submit the Work Plan. The System sends an email to the CPD Rep and the Work Plan creator upon submitting the Work Plan. TA Providers must resolve all the errors prior to submitting the Work Plan. An alert is displayed prior to submission when warnings are found. TA Providers can review the warnings and proceed accordingly.



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

Warnings found x

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 Submission
Review Warnings

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

Submit Work Plan x

* Work Plan Status:

✓ Select One
 Submit Modification
 Submit Amendment
 Cancel Work Plan
 Close Work Plan
 On-Hold

* Submission Comments:

Cancel
Submit

C2. Grantee | Edit Work Plan Details

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



User Role: Grantee User

Menu Option: Manage Work Plans

2 Select the **<Edit>** action in the header.

Manage Work Plan
[Back](#) [Download](#) [Add Comments](#) [Validate Plan](#) [Submit Plan](#)

TA Provider Name:	<input type="text"/>	Work Plan Number:	Work Plan 10504	Edit
Last Updated Date:	09/14/2021	Work Plan Title:	Automation Test Add Work Plan 10504	
Grant Number:	<input type="text"/>	TA Type:	Admin	
Appropriation Code:	<input type="text"/>	Work Plan Type:	Administration	
Project Number:	Administration	Performance Period Start Date:	01/01/2021	
Project Title:	CPD, Housing, Public Housing	Performance Period End Date:	12/31/2021	
Grantee Program:	<input type="text"/>	Approved Work Plan Budget:		
Work Plan Status:	<input checked="" type="checkbox"/> Open	Proposed Work Plan Budget:		

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

Edit Work Plan ✕

Details

* Grant Number:

* TA Provider:

* Project:

Grantee Program:

* Work Plan Number:

* Work Plan Title:

* Work Plan (Activity) Type:

* TA Type (Activity Category):

* Performance Period Start Date:

* Performance Period End Date:

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

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

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



C3. Grantee | Associate Assignments

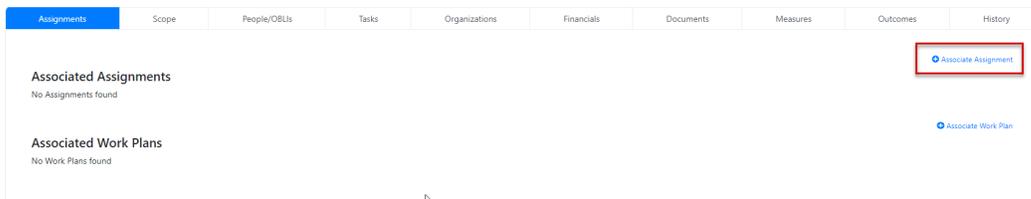
User Role: Grantee User	Menu Option: Manage Work Plans
--------------------------------	---------------------------------------

Purpose: Allow TA Provider Users to associate assignments to a Work Plan.

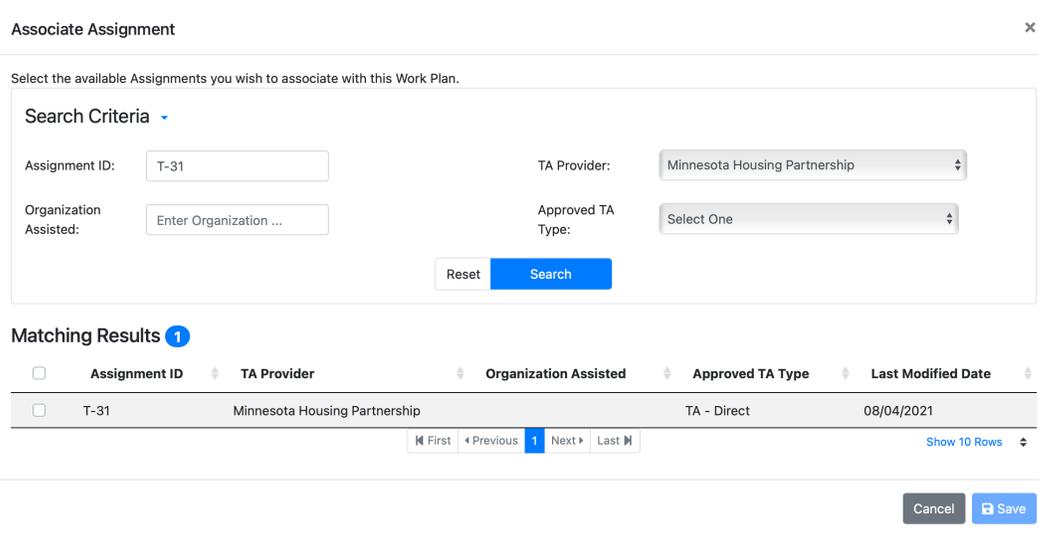
Complete the following steps to associate assignment to a Work Plan:

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

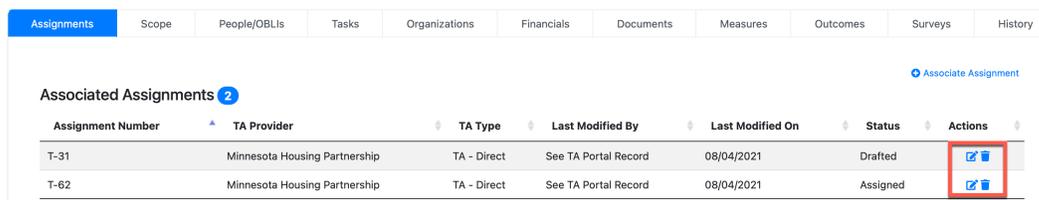
3 Select the **Assignments** tab. Then, select <**Associate Assignment**> to display the “**Associate Assignment**” page.



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



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





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

C4. Grantee | Associate Work Plans

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to associate Work Plans to another Work Plan.	
Complete the following steps to associate Work Plan to another Work Plan:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
2	Select the Assignments tab. Then, select <Associate Work Plan> from the Assignments tab to display the “Associate Work Plan” page.
TA Providers can search by Work Plan Number, TA Provider, and Work Plan Type to retrieve appropriate Work Plans to associate. Select the Work Plan and select <Save> to associate a Work Plan.	



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

Associate Work Plan

Select the available Work Plans you wish to associate with this Work Plan.

Search Criteria

Work Plan Number: TA Provider:

Work Plan Type:

Matching Results 4

<input type="checkbox"/>	Work Plan Number	TA Provider	TA Work Plan Type	Last Modified By	Last Modified Date	Status
<input type="checkbox"/>	WP-09012011-1	Abt Associates Inc	PFS - Capital Raising/Structure Building	Kavitha Vemula	09/01/2021	Open
<input type="checkbox"/>	ABT-M-15-042-04 SNAPS AAQ BRIDGE WP	Abt Associates Inc	TA - AAQ	Francisco Crovetto-Aparicio	03/23/2020	Closed
<input type="checkbox"/>	ABT-C-19-002-02 WP Coord	Abt Associates Inc	TA - Coordination	Jeffrey Hunt	03/23/2020	Approved
<input type="checkbox"/>	ABT-C-19-001-01 WP Admin	Abt Associates Inc	Administration	Thyria Alvarez	03/23/2020	Approved

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

Assignments | Scope | People/OBLs | Tasks | Organizations | Financials | Documents | Measures | Outcomes | Surveys | History

Associated Assignments 2

Assignment Number	TA Provider	TA Type	Last Modified By	Last Modified On	Status	Actions
T-31	Minnesota Housing Partnership	TA - Direct	See TA Portal Record	08/04/2021	Drafted	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
T-62	Minnesota Housing Partnership	TA - Direct	See TA Portal Record	08/04/2021	Assigned	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Associated Work Plans 2

Workplan Number	TA Provider	Work Plan Type	Period of Performance	Status	Actions
ABT-M-15-042-04 SNAPS AAQ BRIDGE WP	Abt Associates Inc	TA - AAQ	07/22/2019 - 10/31/2019	Closed	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
WP-09012011-1	Abt Associates Inc	PFS - Capital Raising/Structure Building	01/01/2021 - 01/01/2022	Open	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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

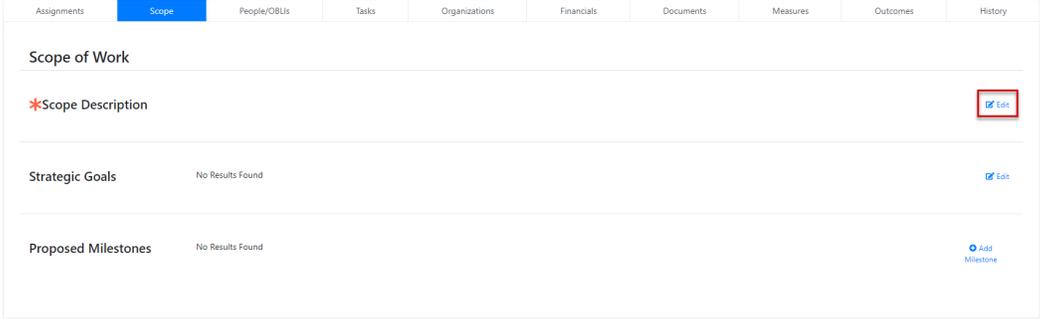
C5. Grantee | Edit Scope Description

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

Purpose: Allow TA Provider Users to add or edit scope for a Work Plan.

Complete the following steps to add or edit the scope of a Work Plan:



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



User Role: Grantee User	Menu Option: Manage Work Plans
<p>3 Enter the desired narrative in the text area. Select <Save> to save the scope description. A success message is displayed upon saving the scope description.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Edit Scope Description ✕ </div> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <div style="font-size: 0.8em; margin-bottom: 5px;">File Edit View Insert Format Tools Table</div> <div style="display: flex; gap: 5px; margin-bottom: 5px;"> B <i>I</i> <u>U</u> ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ↶ ↷ ☰ 🔗 </div> <div style="padding: 5px;"> <p>MHP is authorized to incur Pre-Award costs as needed up to 10% of the award. As a matter of fact it incurred 2.9%. The activities undertaken included but were not limited to:</p> <p>Attendance at HUD's NSP TA 2011 kickoff meeting in March of 2012. Attendance on webinars and conference calls. Setup of administrative systems. Completion of 4 needs assessments (Omaha NE, Pueblo CO, Greeley CO, Weld CO). Performance of On-Call technical assistance to Omaha NE related to DRGR issues. Training/refresher and dissemination of guidance to staff on NSP processes.</p> </div> <div style="display: flex; justify-content: flex-end; align-items: center; gap: 10px; margin-top: 10px;"> Cancel Save </div> </div> </div>	

C6. Grantee | Edit Strategic Goals

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



User Role: Grantee User

Menu Option: Manage Work Plans

- 2 Select the **Scope** tab. Select **<Edit>** in the **Strategic Goals** section. The **“Edit Strategic Goals”** page is displayed.

The screenshot shows a navigation menu with tabs: Assignments, Scope (selected), People/OBLIs, Tasks, Organizations, Financials, Documents, Measures, Outcomes, and History. Below the tabs, there are three sections: 'Scope of Work' with a red asterisk and 'Scope Description' (with an 'Edit' button), 'Strategic Goals' with 'No Results Found' (with an 'Edit' button highlighted in a red box), and 'Proposed Milestones' with 'No Results Found' (with an 'Add Milestone' button).

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

The 'Edit Strategic Goals' modal window contains the following content:

- 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 for Youth
 - Advance Health and Housing Stability for Adults
 - Provide Affordable Housing
 - Provide Permanent Supportive Housing
 - Increase Economic Security
 - Transform Crisis Response Systems
- 2018-2022 Strategic Goals**
 - Goal 1: Advance Economic Opportunity**
 - All/General
 - Bolster Growth in Opportunity Zones
 - Develop Envision Centers
 - Enhance Rental Assistance
 - Promote Section 3
 - Reduce Barriers to Affordable Housing
 - Reduce Homelessness
 - Remove Lead-Based Hazards and Other Health Risks from Homes
 - Support Effectiveness and Accountability in Long-Term Disaster Recovery
 - Support Fair, Sustainable Homeownership and Financial Viability
 - Goal 2: Protect Taxpayer Funds**

Buttons:



C7. Grantee | Manage Proposed Milestones

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to add, edit, and delete Milestones for a Work Plans.	
Complete the following steps to manage add, edit, and delete milestones:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
2	In the Scope tab, select <Add Milestone> in the Milestone section to open the “Add Milestone” window.
3	Specify the Milestone and Expected Date . Then, select <Save> to add the milestone to current Work Plan.
The milestone is displayed in a table.	



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

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

Assignments **Scope** People/OBLs Tasks Organizations Financials Documents Measures Outcomes

Scope of Work

*Scope Description

Strategic Goals No Results Found

Proposed Milestones	Milestone	Expected Date	Actions
	Test Milestone	08/31/2021	
	Test Milestone 2	09/29/2023	

C8. Grantee | Edit Travel Budget

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

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

Complete the following steps to edit the travel budget:

- 1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
- 2 Select the **People/OBLs** tab. Then, select <Edit> in the **Travel Budget** section. The “Edit Travel Budget” page will open.

Assignments Scope **People/OBLs** Tasks Organizations Financials Documents Measures Outcomes History

People/Other Budget Line Items

Travel Budget	*Travel Budget	\$0.00	Edit
---------------	----------------	--------	------

Other Budget Line Item

Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions
Costs + Travel							

Labor Budget

Labor Budget	*Labor Budget	\$0.00	Edit
--------------	---------------	--------	------

Proposed Personnel

Lead	POC	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Rate/HR	Total Hours	Status	Actions
TOTAL: 0											

HUD Reviewers

Role	Staff Member Name	Office	Email
GTR	Nanci Doherty	HUD HEADQUARTERS	T011FO@dhinc.com



User Role: Grantee User	Menu Option: Manage Work Plans
<p>3 Enter the amount and select <Save> to add the travel budget to the current Work Plan. A success message is displayed upon saving the travel budget.</p>	
<div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Edit Travel Budget </div> <div style="margin-top: 10px;"> <p style="margin: 0;">* Travel Budget Amount: <input style="width: 100px;" type="text" value="\$"/></p> </div> <div style="display: flex; justify-content: flex-end; margin-top: 10px;"> Cancel Save </div> </div>	

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

User Role: Grantee User	Menu Option: Manage Work Plans																																																									
Purpose: Allow TA Provider Users to add other budget line item costs to a Work Plans.																																																										
Complete the following steps to add other budget line item costs:																																																										
<p>1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>																																																										
<p>2 Select the People/OBLIs tab. Then, select <Add Cost> in the Other Budget Line Item Costs + Travel section. The “Add Other Budget Line Item Cost” page will open.</p>																																																										
<div style="border: 1px solid #ccc; padding: 10px;"> <p>People/Other Budget Line Items</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> Travel Budget * Travel Budget: \$0.00 </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th style="width: 15%;">Budget Line Item</th> <th style="width: 10%;">Trip</th> <th style="width: 15%;">Associated Tasks</th> <th style="width: 20%;">Description</th> <th style="width: 10%;">Start Date</th> <th style="width: 10%;">End Date</th> <th style="width: 10%;">Amount</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td colspan="8" style="text-align: right; padding-right: 5px;">+ Add Cost</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> Labor Budget * Labor Budget: \$0.00 </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th style="width: 5%;">Lead</th> <th style="width: 20%;">Labor Category & Personnel</th> <th style="width: 15%;">Occupation Type</th> <th style="width: 10%;">Email</th> <th style="width: 10%;">Organization</th> <th style="width: 10%;">Start Date</th> <th style="width: 10%;">End Date</th> <th style="width: 10%;">Rate/HR</th> <th style="width: 10%;">Total Hours</th> <th style="width: 10%;">Status</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td colspan="11" style="text-align: right; padding-right: 5px;">+ Add Personnel</td> </tr> <tr> <td colspan="11">TOTAL: 0</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> HUD Reviewers 1 </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Role</th> <th style="width: 30%;">Staff Member Name</th> <th style="width: 30%;">Office</th> <th style="width: 30%;">Email</th> </tr> </thead> <tbody> <tr> <td>GTR</td> <td>Nanci Doherty</td> <td>HUD HEADQUARTERS</td> <td>T011FO@dmnc.com</td> </tr> </tbody> </table> </div>		Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions	+ Add Cost								Lead	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Rate/HR	Total Hours	Status	Actions	+ Add Personnel											TOTAL: 0											Role	Staff Member Name	Office	Email	GTR	Nanci Doherty	HUD HEADQUARTERS	T011FO@dmnc.com
Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions																																																			
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Lead	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Rate/HR	Total Hours	Status	Actions																																																
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Role	Staff Member Name	Office	Email																																																							
GTR	Nanci Doherty	HUD HEADQUARTERS	T011FO@dmnc.com																																																							



User Role: Grantee User	Menu Option: Manage Work Plans																		
<p>3 TA providers can select a Budget Line Item, provide information for Trip, Associated Tasks, Budget Line Item Description, Start Date, End Date, Budget Amount, and select <Save>. A success message is displayed after adding the budget line item.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: right; margin: 0;">x</p> <p style="margin: 0;">Add Other Budget Line Item Cost</p> <p style="margin: 5px 0;">Enter the values and click save.</p> <div style="margin: 5px 0;"> <p style="margin: 0;">* Budget Line Item: <input style="width: 100%;" type="text" value="OTHER"/></p> <p style="margin: 0;">Trip: <input style="width: 100%;" type="text"/></p> <p style="margin: 0;">Associated Tasks: <input style="width: 100%;" type="text"/></p> <p style="margin: 0;">* Budget Line Item Description: <input style="width: 100%;" type="text"/></p> <p style="margin: 0;">* Start Date: <input style="width: 100%;" type="text" value="10/10/2021"/></p> <p style="margin: 0;">* End Date: <input style="width: 100%;" type="text" value="10/10/2021"/></p> <p style="margin: 0;">* Budget Amount: <input style="width: 100%;" type="text" value="\$ Enter Cost ..."/></p> </div> <p style="text-align: right; margin: 10px 0;"> <input type="button" value="Cancel"/> <input style="background-color: #007bff; color: white; padding: 5px 10px;" type="button" value="Save"/> </p> </div>																			
<p>4 The newly added cost is displayed in a table. Select the pencil icon in the Actions column to modify the selected cost. Select the trash can icon in the Actions column to delete the cost.</p> <div style="margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 10%;">Budget Line Item</th> <th style="width: 10%;">Trip</th> <th style="width: 15%;">Associated Tasks</th> <th style="width: 15%;">Description</th> <th style="width: 10%;">Start Date</th> <th style="width: 10%;">End Date</th> <th style="width: 10%;">Amount</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> - Other Budget Line Item Costs + Travel 1 </td> <td style="text-align: center;">OTHER</td> <td></td> <td></td> <td style="font-size: 0.8em;">Lorem ipsum dolor sit amet</td> <td style="text-align: center;">10/18/2021</td> <td style="text-align: center;">10/21/2021</td> <td style="text-align: center;">\$1.00</td> <td style="text-align: center;"> <div style="display: flex; justify-content: space-around; align-items: center;"> Add Cost <div style="border: 1px solid #007bff; padding: 2px;"> </div> </div> </td> </tr> </tbody> </table> </div>			Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions	<ul style="list-style-type: none"> - Other Budget Line Item Costs + Travel 1 	OTHER			Lorem ipsum dolor sit amet	10/18/2021	10/21/2021	\$1.00	<div style="display: flex; justify-content: space-around; align-items: center;"> Add Cost <div style="border: 1px solid #007bff; padding: 2px;"> </div> </div>
	Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions											
<ul style="list-style-type: none"> - Other Budget Line Item Costs + Travel 1 	OTHER			Lorem ipsum dolor sit amet	10/18/2021	10/21/2021	\$1.00	<div style="display: flex; justify-content: space-around; align-items: center;"> Add Cost <div style="border: 1px solid #007bff; padding: 2px;"> </div> </div>											

C10. Grantee | Edit Labor Budget

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



User Role: Grantee User	Menu Option: Manage Work Plans
<p>2 Select the People/OBLs tab. Then, select <Edit> in the Labor Budget section to open the “Edit Labor Budget” window.</p>	
<p>3 Enter the amount and select <Save> to add labor budget amount. A success message is displayed upon adding a labor budget amount.</p>	

C11. Grantee | Manage Proposed Personnel

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to add personnel to or remove personnel from a Work Plans.	
Complete the following steps to add or remove personnel:	
<p>1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>	



User Role: Grantee User

Menu Option: Manage Work Plans

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

People/Other Budget Line Items

Travel Budget * Travel Budget: \$0.00

Budget Line Item	Trip	Associated Tasks	Description	Start Date	End Date	Amount	Actions
Other Budget Line Item Costs + Travel 1	OTHER		Lorem ipsum dolor sit amet	10/10/2021	10/21/2021	\$1.00	

Labor Budget * Labor Budget: \$0.00

Lead POC	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Status	Actions

Role	Staff Member Name	Office	Email
GTR	Nanci Doherty	HUD HEADQUARTERS	T011FO@dminc.com

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

Add Personnel ✕

Display Inactive Labor Categories , Personnel and Rates

* Labor Category & Personnel:

* Rate:
Labor Category & Personnel selection required first.

* Proposed Number Of Hours:

* Start Date:

* End Date:

Lead POC: Yes

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



User Role: Grantee User	Menu Option: Manage Work Plans																																	
<p>4 The select labor category and rate is displayed in a table.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Proposed Personnel Add Personnel </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th style="width: 15%;">Lead POC</th> <th style="width: 20%;">Labor Category & Personnel</th> <th style="width: 15%;">Occupation Type</th> <th style="width: 15%;">Email</th> <th style="width: 10%;">Organization</th> <th style="width: 5%;">Start Date</th> <th style="width: 5%;">End Date</th> <th style="width: 5%;">Rate/HR</th> <th style="width: 5%;">Total Hours</th> <th style="width: 5%;">Status</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td>STAFF Grammar Fascist Iris Rhoads</td> <td></td> <td>Ins.L.Rhoads@demonstration.com</td> <td>Crafts Canada</td> <td>10/18/2021</td> <td>10/22/2021</td> <td>\$125.00</td> <td>0</td> <td>Approved</td> <td style="text-align: center;"> </td> </tr> <tr> <td colspan="9">TOTAL:</td> <td>0</td> <td></td> </tr> </tbody> </table> </div> <p>Select the pencil icon in the Actions column to modify the selected row (e.g., replace TBD with a specific individual’s name, change the estimated hours, etc.). If hours have not been allocated to the individual or labor category on the Tasks tab, select the trash can icon in the Actions column to remove the labor category and rate.</p>		Lead POC	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Rate/HR	Total Hours	Status	Actions		STAFF Grammar Fascist Iris Rhoads		Ins.L.Rhoads@demonstration.com	Crafts Canada	10/18/2021	10/22/2021	\$125.00	0	Approved		TOTAL:									0	
Lead POC	Labor Category & Personnel	Occupation Type	Email	Organization	Start Date	End Date	Rate/HR	Total Hours	Status	Actions																								
	STAFF Grammar Fascist Iris Rhoads		Ins.L.Rhoads@demonstration.com	Crafts Canada	10/18/2021	10/22/2021	\$125.00	0	Approved																									
TOTAL:									0																									

C12. Grantee | View HUD Reviewers

User Role: Grantee User	Menu Option: Manage Work Plans								
Purpose: View HUD Reviewers associated with a Work Plan.									
Complete the following steps to view HUD Reviewers:									
<p>1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>									
<p>2 Select the People/OBLIs tab. The HUD Reviewers section displays information about HUD Reviewers by Role, Staff Member Name, Office, and Email.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> HUD Reviewers Add </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th style="width: 15%;">Role</th> <th style="width: 20%;">Staff Member Name</th> <th style="width: 15%;">Office</th> <th style="width: 50%;">Email</th> </tr> </thead> <tbody> <tr> <td>GTR</td> <td>T039FOFirst T039FOLast</td> <td>HUD HEADQUARTERS</td> <td>T039FO@dminc.com</td> </tr> </tbody> </table> </div>		Role	Staff Member Name	Office	Email	GTR	T039FOFirst T039FOLast	HUD HEADQUARTERS	T039FO@dminc.com
Role	Staff Member Name	Office	Email						
GTR	T039FOFirst T039FOLast	HUD HEADQUARTERS	T039FO@dminc.com						

C13. Grantee | Manage Tasks

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



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

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

Assignments Scope People/OBLIs **Tasks** Organizations Financials Documents Measures Outcomes History

Tasks ▼ Expand All ▲ Collapse All ➕ Add Task

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

Add Task ✕

* Task Number:

* Task Name:

* Task Narrative (Description):

* Task Status:

* Performance Period Start Date:

* Performance Period End Date:

* Estimated Cost (Budget):

* Estimated Hours:

Topics:

Homelessness

AHAR/Point in Time Count AHAR Participation

AHAR/Point in Time Count Data analysis reporting

CPD-SN: CARES Act: ESG

CPD-SN: Chronic Homeless

CPD-SN: CoC Coordinated Entry

CPD-SN: CoC Governance

Tasks ➕ Add Task

Task 1: Test Task Estimated Hours: 10 Estimated Cost: \$50.00 Status: Open Delete



User Role: Grantee User Menu Option: Manage Work Plans

Tasks Add Task

Task 1: Test Task Start/End Date: 01/31/2021 - 11/23/2022 Estimated Hours: 10 Estimated Cost: \$50.00 Status: Open Delete

Details Narrative: Test Task Edit

Personnel Budget

Key	Labor Category & Personnel	Estimated Hours	Rate per Hour	Estimated Cost	Status
TOTAL:		0		\$0.00	

Outputs

Output Title	Estimated Completion Date	Output Description
--------------	---------------------------	--------------------

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

Tasks Add Task

Task 1: Test Task Start/End Date: 01/31/2021 - 11/23/2022 Estimated Hours: 10 Estimated Cost: \$50.00 Status: Open Delete

Details Narrative: Test Task Edit

Personnel Budget

Key	Labor Category & Personnel	Estimated Hours	Rate per Hour	Estimated Cost	Status
TOTAL:		0		\$0.00	

Outputs

Output Title	Estimated Completion Date	Output Description
--------------	---------------------------	--------------------

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

Tasks Add Task

Task 1: Test Task Start/End Date: 01/31/2021 - 11/23/2022 Estimated Hours: 10 Estimated Cost: \$50.00 Status: Open Delete

Details Narrative: Test Task Edit

Personnel Budget

Key	Labor Category & Personnel	Estimated Hours	Rate per Hour	Estimated Cost	Status
TOTAL:		0		\$0.00	

Outputs

Output Title	Estimated Completion Date	Output Description
--------------	---------------------------	--------------------

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



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

Add/Edit Task Personnel Budget ✕

Key	Labor Category & Personnel	#Hours	Rate	Total	Status
<input type="checkbox"/>	CONTRACTOR Albanese, Tom 2021-01/01/2021 User G	<input type="text"/>	\$4.00	\$0.00	Approved
<input type="checkbox"/>	STAFF Manager Warner, Leslie J 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Research Assistant Hassman, Nicole 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Senior Manager Cuneo, Janine 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Manager Key, Chantel 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Manager Richmond, Kristen B 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	CONTRACTOR Albanese, Tom 2021-01/01/2021 User F	<input type="text"/>	\$4.00	\$0.00	Approved
<input type="checkbox"/>	STAFF Senior Associate Wolfe, Ilona T 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Senior Associate Ziolkowski, Michael 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Manager Jones, Phillip N 2019-03/02/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Research Assistant Healey, Olivia 2019-05/01/2019 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
<input type="checkbox"/>	STAFF Associate Xu, Jie 2020-03/14/2020 TBD	<input type="text"/>	\$4.00	\$0.00	Inactive
TOTAL:		<input type="text" value="0"/>		\$0.00	

Cancel
Save

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

Tasks + Add Task

Task 1: Test Task Start/End Date: 01/31/2021 - 11/23/2022 Estimated Hours: 10 Estimated Cost: \$50.00 Status: Open Delete

Details Edit

Narrative: Test Task

Personnel Budget Edit

Key	Labor Category & Personnel	Estimated Hours	Rate per Hour	Estimated Cost	Status
TOTAL:		0		\$0.00	

Outputs + Edit

#	Output Title	Estimated Completion Date	Output Description
1.	<input type="text" value="EVALUATIONS/Q&AS"/>	<input type="text" value="05/31/2021"/>	<input type="text" value="Training evaluations for each session. A list of Q&As sent to HUD for each session if applicable."/>

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

Add/Edit Task Outputs ✕

+ Add Output

#	Output Title	Estimated Completion Date	Output Description	Actions
1.	<input type="text" value="EVALUATIONS/Q&AS"/>	<input type="text" value="05/31/2021"/>	<input type="text" value="Training evaluations for each session. A list of Q&As sent to HUD for each session if applicable."/>	Delete

Cancel
Save



C14. Grantee | Associate Organization Groups

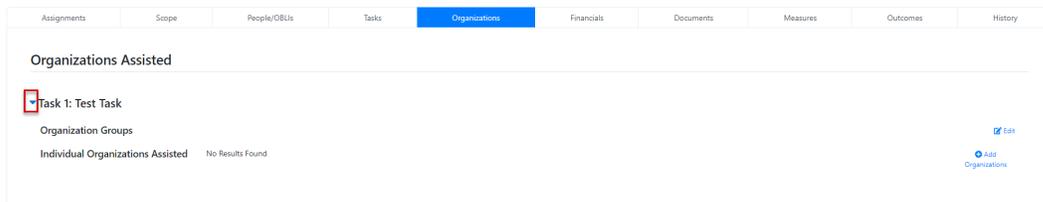
User Role: Grantee User	Menu Option: Manage Work Plans
--------------------------------	---------------------------------------

Purpose: Allow TA Provider Users to manage the list organization groups that will benefit from the Technical Assistance described by the Work Plans.

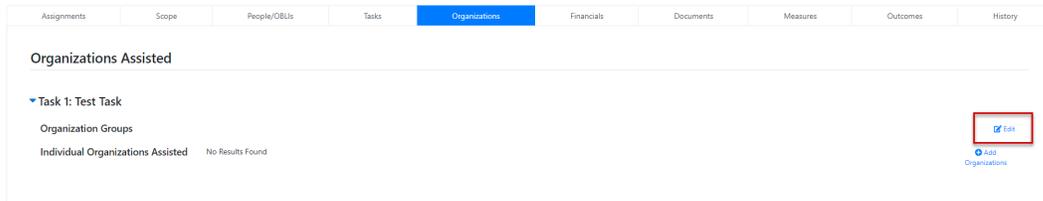
Complete the following steps to associate and manage organization groups:

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

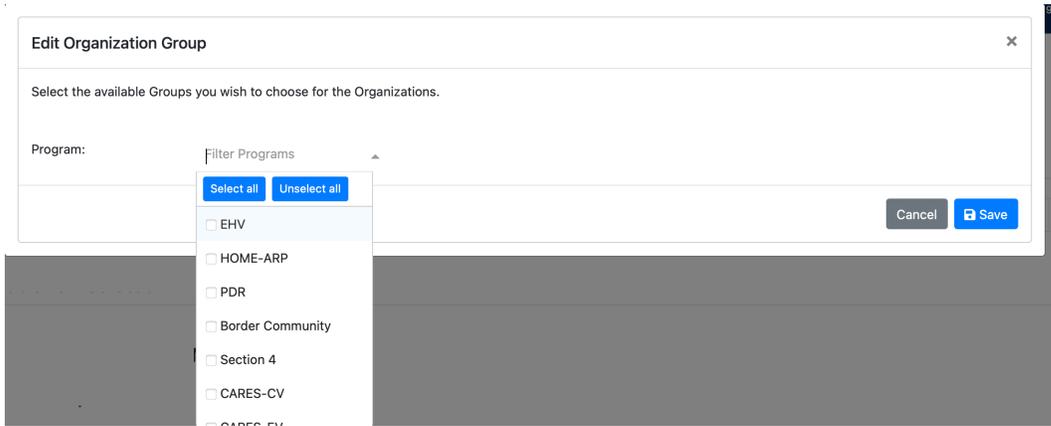
2 Select the **Organizations** tab. Then, select the Expand icon for the desired task. **NOTE:** All the tasks entered in the **Tasks** tab will be displayed here so TA providers can associate assisted organization groups and individual organizations.



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



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



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



C15. Grantee | Associate Individual Organizations

User Role: Grantee User	Menu Option: Manage Work Plans
<p>Purpose: Allow TA Provider Users to manage the list organizations assisted by the Technical Assistance described by the Work Plan.</p>	
<p> Complete the following steps to associate individual organizations:</p>	
1	<p>Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>
2	<p>Select the Organizations tab. Then, select the Expand icon for the desired task. NOTE: All the tasks entered in Tasks tab will be displayed here so TA providers can associate assisted organization groups and individual organizations.</p> <div data-bbox="250 753 1295 955" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div>
3	<p>Selecting <Add Organizations> opens the “Add Organization” page.</p> <div data-bbox="250 1039 1295 1241" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div>
4	<p>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.</p> <p>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</p>



User Role: Grantee User	Menu Option: Manage Work Plans																																						
<p>select <Save> to add organizations to current Work Plan.</p> <p>Add Organizations</p> <hr/> <p>Select the available Organizations you wish to associate with this Workplan Task</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Search Criteria ▾</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Organization Assisted: <input style="width: 80%;" type="text" value="Enter ..."/></td> <td style="width: 50%;">Program: <input style="width: 80%;" type="text" value="Enter ..."/></td> </tr> <tr> <td>Field Office: <input style="width: 80%;" type="text" value="Enter ..."/></td> <td>Office: <input style="width: 80%;" type="text" value="Enter ..."/></td> </tr> <tr> <td>Region: <input style="width: 80%;" type="text" value="Enter ..."/></td> <td>Asst Sec Office: <input style="width: 80%;" type="text" value="Enter ..."/></td> </tr> <tr> <td>DUNS Number: <input style="width: 80%;" type="text" value="Enter ..."/></td> <td>Unique Entity Identifier: <input style="width: 80%;" type="text" value="Enter ..."/></td> </tr> </table> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Reset"/> <input style="background-color: #007bff; color: white; padding: 2px 10px;" type="button" value="Search"/> </p> </div> <p>Matching Results 50319</p> <div style="text-align: right; margin-bottom: 10px;">Search: <input style="width: 100px;" type="text"/></div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.9em;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 15%;">Organization Assisted</th> <th style="width: 10%;">Program</th> <th style="width: 5%;">Asst Sec Office</th> <th style="width: 10%;">Office</th> <th style="width: 15%;">Field Office</th> <th style="width: 15%;">Region</th> <th style="width: 5%;">State</th> <th style="width: 10%;">DUNS</th> <th style="width: 10%;">UEI</th> </tr> </thead> <tbody> <tr style="background-color: #f2f2f2;"> <td style="text-align: center;"><input type="checkbox"/></td> <td>%WALTER RILEY DAVIS SENIOR COMPLEX CORP</td> <td>Section 202</td> <td>HSG</td> <td>Multifamily</td> <td>ILLINOIS STATE OFFIC</td> <td>Region V - Illinois Indiana Michigan Minnesota Ohio Wisconsin</td> <td>WI</td> <td>878155402</td> <td>RT9EPFI</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>10 ORCHARD STREFF HDF</td> <td>Project Based</td> <td>HSG</td> <td>Multifamily</td> <td>NEW YORK SO (NYSO)</td> <td>Region II - New York New Jersey</td> <td>NY</td> <td>605737845</td> <td>LEYSDK</td> </tr> </tbody> </table>		Organization Assisted: <input style="width: 80%;" type="text" value="Enter ..."/>	Program: <input style="width: 80%;" type="text" value="Enter ..."/>	Field Office: <input style="width: 80%;" type="text" value="Enter ..."/>	Office: <input style="width: 80%;" type="text" value="Enter ..."/>	Region: <input style="width: 80%;" type="text" value="Enter ..."/>	Asst Sec Office: <input style="width: 80%;" type="text" value="Enter ..."/>	DUNS Number: <input style="width: 80%;" type="text" value="Enter ..."/>	Unique Entity Identifier: <input style="width: 80%;" type="text" value="Enter ..."/>		Organization Assisted	Program	Asst Sec Office	Office	Field Office	Region	State	DUNS	UEI	<input type="checkbox"/>	%WALTER RILEY DAVIS SENIOR COMPLEX CORP	Section 202	HSG	Multifamily	ILLINOIS STATE OFFIC	Region V - Illinois Indiana Michigan Minnesota Ohio Wisconsin	WI	878155402	RT9EPFI	<input type="checkbox"/>	10 ORCHARD STREFF HDF	Project Based	HSG	Multifamily	NEW YORK SO (NYSO)	Region II - New York New Jersey	NY	605737845	LEYSDK
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5	<p>Associated individual organizations are displayed under the Organizations tab in the Individual Organizations Assisted section in grid.</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em; margin: 10px 0;"> <thead> <tr> <th style="width: 15%;">Individual Organizations Assisted</th> <th style="width: 15%;">Organization Assisted</th> <th style="width: 10%;">Program</th> <th style="width: 5%;">Asst Sec Office</th> <th style="width: 10%;">Office</th> <th style="width: 15%;">Field Office</th> <th style="width: 5%;">Region</th> <th style="width: 5%;">State</th> <th style="width: 10%;">DUNS</th> <th style="width: 10%;">Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td>%WALTER RILEY DAVIS SENIOR COMPLEX CORP</td> <td>Section 202</td> <td>HSG</td> <td>Multifamily</td> <td>ILLINOIS STATE OFFIC</td> <td>-</td> <td>WI</td> <td>878155402</td> <td style="text-align: center;"> </td> </tr> </tbody> </table> <p>Selecting the trash can icon in the Actions column allows TA providers to delete the organization from current Work Plan task.</p> <p>NOTE: TA providers can follow the steps provided in C14 – Associate Organization Groups section of this document to add Organization Groups and Organizations to all tasks under current Work Plan.</p>									Individual Organizations Assisted	Organization Assisted	Program	Asst Sec Office	Office	Field Office	Region	State	DUNS	Actions		%WALTER RILEY DAVIS SENIOR COMPLEX CORP	Section 202	HSG	Multifamily	ILLINOIS STATE OFFIC	-	WI	878155402											
Individual Organizations Assisted	Organization Assisted	Program	Asst Sec Office	Office	Field Office	Region	State	DUNS	Actions																														
	%WALTER RILEY DAVIS SENIOR COMPLEX CORP	Section 202	HSG	Multifamily	ILLINOIS STATE OFFIC	-	WI	878155402																															

C16. Grantee | Manage Financials

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



User Role: Grantee User

Menu Option: Manage Work Plans

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

2 Select the **Financials** tab. The **Overall** section allows TA providers to view all financial information for the current Work Plan.

The screenshot shows the 'Financials' tab selected in a navigation menu. Below the menu, the 'Overall' section displays a table with the following data:

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
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

Below the table, the 'Funding Sources' section shows 'No Results Found' with an 'Edit' link. The 'Drawdown Block' section shows 'HUD Block Drawdown: No'.



User Role: Grantee User	Menu Option: Manage Work Plans
<p>If one or more Funding Sources were specified in the grant’s Action Plan, the amount allocated for the Work Plan from each funding source can be specified using the <Edit> link in the Funding Sources section.</p>	
<p>3 Drawdown Block section allows TA providers to view when a block is set for current Work Plan by HUD users.</p>	

C17. Grantee | Manage Documents

User Role: Grantee User	Menu Option: Manage Work Plans
<p>Purpose: Allow TA Provider Users to add documents to, view/download documents, or remove documents from a Work Plan.</p>	
<p> Complete the following steps to manage documents:</p>	
1	<p>Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>
2	<p>The Documents tab allows TA providers to add any documents to current Work Plan. Selecting <Add Document> allows TA providers to add documents.</p> <p>Note: The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.</p>



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

Assignments | Scope | People/OBLIs | Tasks | Organizations | Financials | **Documents** | Measures | Outcomes | History

Supporting Documents 3

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

Name	Date	Type	Uploaded By	Actions
ICF-C-19-006 - 006 LSHR J&K Training & Webinars_Version 2_TA Portal_06.15.2020.pdf	06/15/2020	PDF	Cindy Choi	
ICF-C-19-006 - 006 LSHR J&K Training & Webinars_Version 1_TA Portal_01.14.2020.pdf	01/14/2020	PDF	Cindy Choi	
Tasking email.pdf	01/14/2020	PDF	Cindy Choi	

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

C18. Grantee | Manage Measures

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

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

Complete the following steps to manage measures:

- Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
- The **Measures** tab allows TA providers to add proposed accomplishments to current Work Plan.
- Selecting <Edit> opens the “Edit Accomplishment Performances” page allowing TA providers to specify performance measures.

Assignments | Scope | People/OBLIs | Tasks | Organizations | Financials | Documents | **Measures** | Outcomes | History

Proposed Accomplishments

Performance Measure	Proposed Total	Actions
# of community programs supported		
# of in-person engagements/trainings		
# Needs assessments completed		
# of organizations served		
# hours		

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

Edit Accomplishment Performances ✕

Performance Measure	Proposed Total
# of community programs supported	Total...
# of in-person engagements/trainings	Total...
# Needs assessments completed	Total...
# of organizations served	Total...
# hours	Total...

Cancel Save



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

C19. Grantee | Manage Learning Objectives and Outcomes

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider Users to manage outcomes and learning objectives for a Work Plan.	
Complete the following steps to manage learning objectives and outcomes:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
2	Select the Outcomes tab. Then, select <Add Objective>.
3	Selecting <Add Objective> allows TA providers to add an objective using the “Add Learning Objective” page. TA providers can add an objective with description and select <Save> to add a learning objective to current Work Plan.



User Role: Grantee User	Menu Option: Manage Work Plans												
<p>4 The learning objectives are displayed in a grid. Selecting the pencil icon in the Actions column allows user to edit an existing learning objective. Selecting the trash can icon in the Actions column allows users to delete an existing learning objective.</p>													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Learning Objectives</th> <th style="text-align: left;">Objective</th> <th style="text-align: left;">Description</th> <th style="text-align: left;">Actions</th> </tr> </thead> <tbody> <tr> <td>TA Portal Learning Objective #1</td> <td>TA Portal Learning Objective #1</td> <td>Be able to identify requirements for the Lead Safe Housing Rule 24 CFR Part 35 Subparts J and K for CPD and ONAP Grantees and their subrecipients.</td> <td> </td> </tr> <tr> <td>TA Portal Learning Objective #2</td> <td>TA Portal Learning Objective #2</td> <td>Be able to properly construct project files to capture activities and applicability of the LSHR</td> <td> </td> </tr> </tbody> </table>		Learning Objectives	Objective	Description	Actions	TA Portal Learning Objective #1	TA Portal Learning Objective #1	Be able to identify requirements for the Lead Safe Housing Rule 24 CFR Part 35 Subparts J and K for CPD and ONAP Grantees and their subrecipients.		TA Portal Learning Objective #2	TA Portal Learning Objective #2	Be able to properly construct project files to capture activities and applicability of the LSHR	
Learning Objectives	Objective	Description	Actions										
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TA Portal Learning Objective #2	TA Portal Learning Objective #2	Be able to properly construct project files to capture activities and applicability of the LSHR											

C20. Grantee | Manage Outcomes

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



User Role: Grantee User	Menu Option: Manage Work Plans
<p>3 Select the applicable outcomes and select <Save> to save HUD outcomes for the current Work Plan.</p> <hr/> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Edit HUD Outcomes for x </div> <p>Select the options you wish to complete the outcomes on:</p> <p>HUD Outcome Category #1: Improved capacity to develop plans and priorities informed by community needs and program/policy goals</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1A: Improved capacity to collect, analyze, and share data (e.g., improved data on populations served, program results or impacts, or community conditions) <input type="checkbox"/> 1B: 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) <input type="checkbox"/> 1C: Improved capacity to develop high-quality, compliant plans that identify clear priorities and accurately reflect community needs and input (e.g., improved PHA Plans, Consolidated Plans, Indian Housing Plans) <input type="checkbox"/> 1D: Improved coordination and alignment with other community or regional plans (e.g., HUD plans aligned with plans of other HUD or federal programs, local and regional government agencies, service providers, or nonprofit organizations) <p>HUD Outcome Category #2: Improved capacity to design strategies that align with plans and priorities</p> <ul style="list-style-type: none"> <input type="checkbox"/> 2A: Improved capacity to select programmatic strategies that address program or policy goals and community needs (e.g., determined which eligible activities could most effectively address needs) <input type="checkbox"/> 2B: Improved capacity to design system-wide strategies that address community needs (e.g., designed innovative multi-disciplinary strategies, designed coordinated place-based development to leverage neighborhood impacts) <input type="checkbox"/> 2C: Improved capacity to design effective partnerships or cross-jurisdictional relationships that address community needs (e.g., developed a framework for collaboration, established new or innovative partnerships, developed governance charters or memoranda of understanding) <input type="checkbox"/> 2D: Improved alignment of resources with program-, system- or community-wide goals (e.g., developed an investment plan to support a system-wide strategy, developed resource allocation processes to improve targeting of resources to plan goals) <p>HUD Outcome Category #3: Improved capacity to deliver projects, programs or systems that address community needs</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3A: Improved staffing or organizational structure (e.g., revised job descriptions to reflect skills required to implement program, merged departments to achieve greater efficiency or alignment) <input type="checkbox"/> 3R: Improved administrative processes or infrastructure (e.g., improved cost and participant eligibility verification procedures, instituted new policies and <div style="text-align: right; margin-top: 10px;"> Cancel Save </div>	

C21. Grantee | Manage Surveys

User Role: Grantee User	Menu Option: Manage Work Plans											
Purpose: Allow TA Provider Users to add, edit, and delete surveys for a Work Plans.												
Complete the following steps to manage surveys:												
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.											
2	Select the Surveys tab. Then, select <Add Survey> in the Survey section to open the “Add Survey” page. Note: Currently, the survey tab is only displayed for Direct TA Work Plans.											
<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <table style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Assignments</td> <td style="border: 1px solid #ccc; padding: 2px;">Scope</td> <td style="border: 1px solid #ccc; padding: 2px;">People/OBUs</td> <td style="border: 1px solid #ccc; padding: 2px;">Tasks</td> <td style="border: 1px solid #ccc; padding: 2px;">Organizations</td> <td style="border: 1px solid #ccc; padding: 2px;">Financials</td> <td style="border: 1px solid #ccc; padding: 2px;">Documents</td> <td style="border: 1px solid #ccc; padding: 2px;">Measures</td> <td style="border: 1px solid #ccc; padding: 2px; background-color: #007bff; color: white;">Outcomes</td> <td style="border: 1px solid #ccc; padding: 2px; background-color: #007bff; color: white;">Surveys</td> <td style="border: 1px solid #ccc; padding: 2px;">History</td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Surveys Add Survey </div> </div>		Assignments	Scope	People/OBUs	Tasks	Organizations	Financials	Documents	Measures	Outcomes	Surveys	History
Assignments	Scope	People/OBUs	Tasks	Organizations	Financials	Documents	Measures	Outcomes	Surveys	History		



User Role: Grantee User	Menu Option: Q Manage Work Plans
--------------------------------	--

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

Add Survey ✕

Details

Survey Name:

* Brief Description of TA Provided:

* Engagement Start Date:

* Engagement End Date:

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

Assignments Scope People/OBLs Tasks Organizations Financials Documents Measures Outcomes **Surveys** History

Surveys Add Survey

Survey: Example Delete

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

Assignments Scope People/OBLs Tasks Organizations Financials Documents Measures Outcomes **Surveys** History

Surveys Add Survey

Survey: Example Delete

Details Engagement Start Date: 10/18/2021 Engagement End Date: 10/22/2021 Edit Details

Description of TA Provided: Lorem Ipsum

Outcomes No Results found. Edit Outcomes

Organizations No Results found. Add Organization

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

Assignments Scope People/OBLs Tasks Organizations Financials Documents Measures Outcomes **Surveys** History

Surveys Add Survey

Survey: Example Delete

Details Engagement Start Date: 10/18/2021 Engagement End Date: 10/22/2021 Edit Details

Description of TA Provided: Lorem Ipsum

Outcomes No Results found. Edit Outcomes

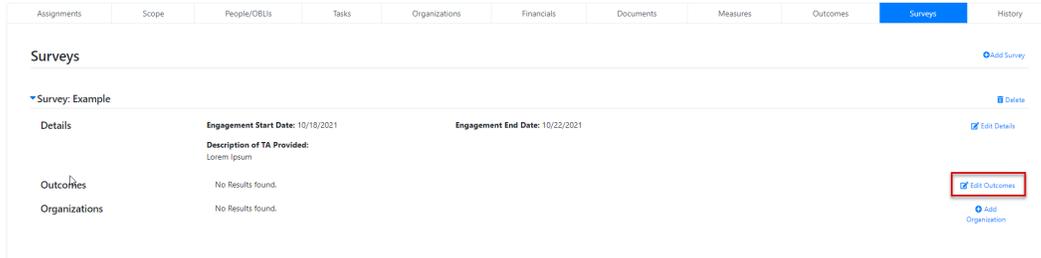
Organizations No Results found. Add Organization



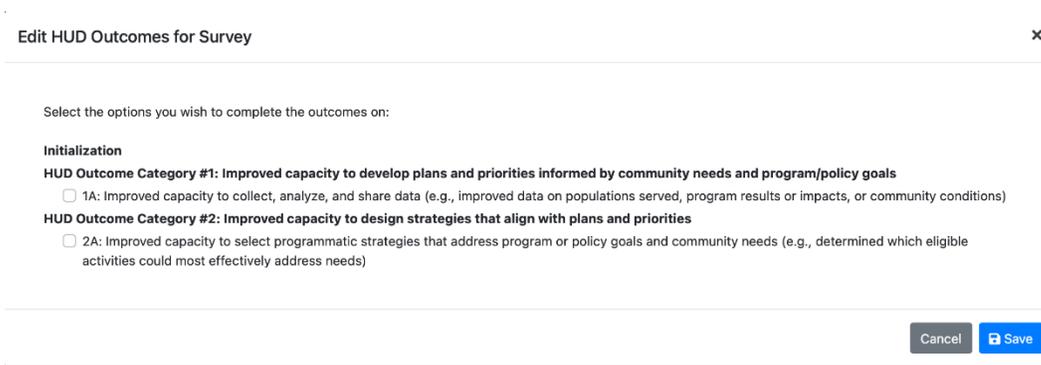
User Role: Grantee User

Menu Option: Manage Work Plans

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



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



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

Outcomes	Task	Category	Outcome	Description	Actions
	Initialization	HUD Outcome Category #1: Improved capacity to develop plans and priorities informed by community needs and program/policy goals	1A: Improved capacity to collect, analyze, and share data (e.g., improved data on populations served, program results or impacts, or community conditions)		

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



User Role: Grantee User

Menu Option: Manage Work Plans

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

Add Survey Organization

*Survey Type: Organization Assisted

*First Name: Enter First Name ...

*Last Name: Enter Last Name ...

*Email: Enter Email ...

Organization: Search Organization

Cancel Save

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

Organizations	Name	Organization Assisted	Email	Survey Type	Status	Date/Time Sent	Actions	Add Organization
	John Doe		jdoe@doe.com	Organization Assisted	Not Sent			

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

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

Assignments Scope People/OBIs Tasks Organizations Financials Documents Measures Outcomes **Surveys** History

Surveys [Add Survey](#)

Survey: Example [Delete](#) **Send Survey** [Edit Details](#)

Details Engagement Start Date: 10/18/2021 Engagement End Date: 10/22/2021
Description of TA Provided: Lorem Ipsum

Outcomes No Results found. [Edit Outcomes](#)

Organizations

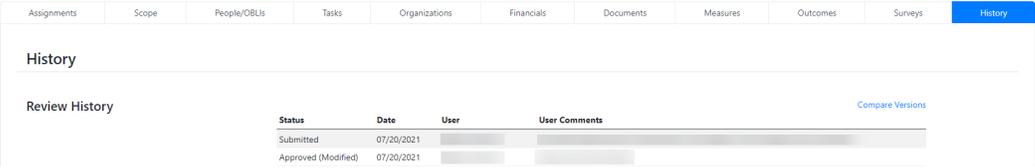
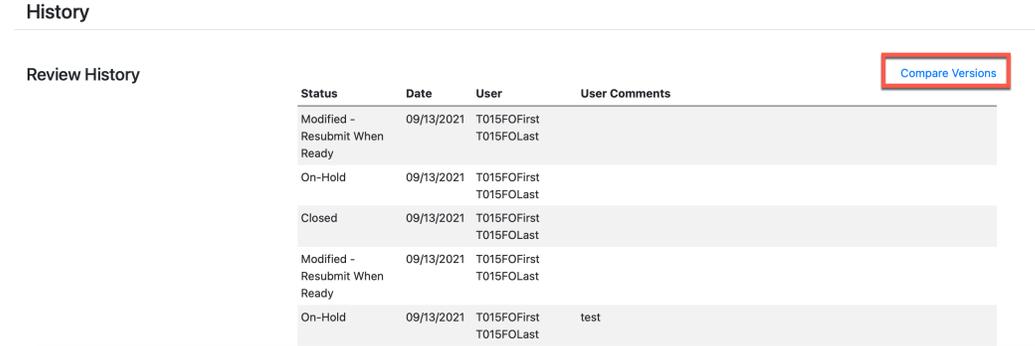
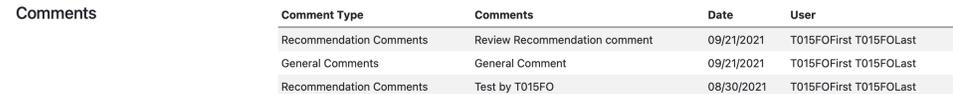
Name	Organization Assisted	Email	Survey Type	Status	Date/Time Sent	Actions	Add Organization
Jane Doe		JaneDoe@example.com	Organization Assisted	Not Sent			

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

Organizations	Name	Organization Assisted	Email	Survey Type	Status	Date/Time Sent	Actions
	John Doe		jdoe@doe.com	Organization Assisted	Survey Request In Progress	10/10/2021	



C22. Grantee and HUD | View History

User Role: Grantee User	Menu Option: Q Manage Work Plans
Purpose: Allow TA Provider and HUD users to view history of a Work Plan.	
<input checked="" type="checkbox"/> Complete the following steps to view history of a Work Plan:	
<p>1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>	
<p>2 Select the History tab.</p>	
	
<p>3 The History tab includes a section for Review History. The grid contains Status, Date, User, User Comments. TA providers can also review the differences between two versions of a Work Plan by selecting <Compare Versions> and then selecting the two versions that should be compared.</p>	
	
<p>4 The History tab includes a section for Comments. TA providers can view both Review Recommendation Comments as well as General Comments along with Date and User information of who added the comments.</p>	
	



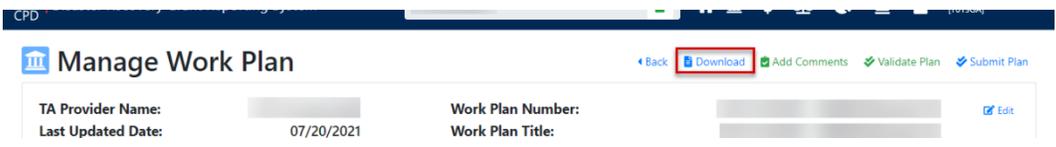
D. Grantee and HUD | View Work Plan

User Role: Grantee and HUD User	Menu Option: Manage Work Plans																																
Purpose: Allow TA Providers and HUD users to view a Work Plans.																																	
Complete the following steps to view a Work Plan:																																	
1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.																																	
2 Selecting the icon in Actions column will open the “View Work Plan” page.																																	
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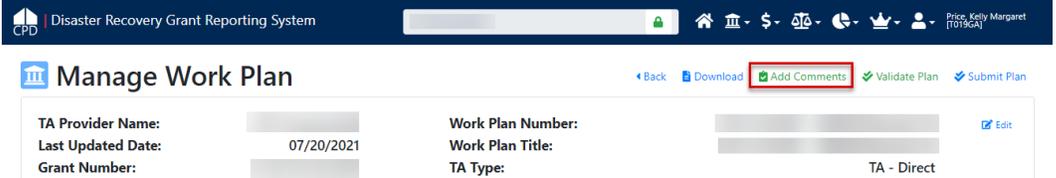
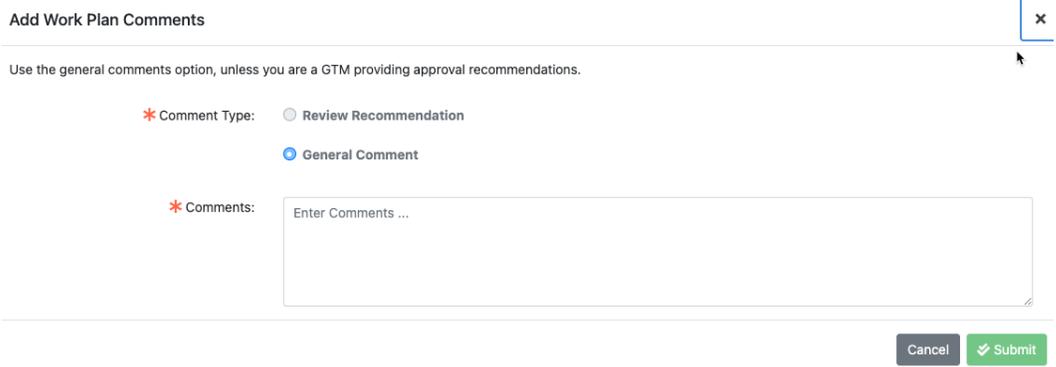
E. Grantee and HUD | Download Work Plan

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



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

F. Grantee and HUD | Add Comments to Work Plan

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider and HUD users to add comments to a Work Plan.	
Complete the following steps to add comment to a Work Plan:	
<p>1 Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.</p>	
<p>2 Select <Add Comments> on the “Manage Work Plan” page.</p>  <p>The “Add Work Plan Comments” page will open. Note: TA providers can only add General Comments. HUD users can add Review Recommendations as well as General Comments.</p> 	



G. Grantee and HUD | Validate Work Plan

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Provider and HUD users to validate a Work Plans.	
Complete the following steps to validate a Work Plan:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
2	Select <Validate Plan> in the secondary navigation menu on “Manage Work Plan” page to validate the Work Plan.

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

H. Grantee | Submit Work Plan

User Role: Grantee User	Menu Option: Manage Work Plans
Purpose: Allow TA Providers to submit a Work Plan.	
Complete the following steps to submit a Work Plan:	
1	Follow the steps provided in Section C1 to search for a Work Plan. Then, select the pencil icon in the Actions column to navigate to the “Manage Work Plan” page.
2	Select <Submit Plan> in the secondary navigation menu on the “Manage Work Plan” page to submit the Work Plan.



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

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 Submission](#)

[Review Warnings](#)

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

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

Submit Work Plan

* Work Plan Status:

- ✓ Select One
- Submit Modification
- Submit Amendment
- Cancel Work Plan
- Close Work Plan
- On-Hold

* Submission Comments:

[Cancel](#) [Submit](#)

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

I. Upload Work Plan Data

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