

Chapter 18: Technical Assistance Work Plan – HUD Review | Manage My Grants Module

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# Chapter 18: Technical Assistance Work Plan - HUD Review

This Chapter provides instruction to HUD users authorized to approve Technical Assistance Work Plans, in the **Manage My Grants** module. This Chapter describes the actions of HUD Users when approving Work Plans submitted by technical assistance provider organizations (TA Providers) and is divided into subsections. The following actions are covered in this Chapter:

Grantee Users						
Menu Option Subsection Action						
<b>Q</b> Manage Work Plans	B1	Search for and Review Work Plans				

### A. Manage My Grants Module Access

The Manage My Grants module contains the Work Plan functions.

#### A1. HUD | User Access

Us	User Role: HUD User Menu Option: ፹ Manage My Grants Module								
Pu	rpose: Allow Grai	ntee Users to a	ccess Work P	Plan actions.					
2	Complete the following steps to access the Manage My Grants Module:								
1	In the DRGR System, select the <b>Manage My Grants</b> module, or $\hat{\mathbf{m}}$ icon, located in the navigation menu.								
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2	This opens the d the relevant mer Manage My Gran	ropdown menu nu items based ts	u items for th on HUD Use	e <b>Manage N</b> r role.	ly Grants module. 1	Րhe DRGR Sy։	stem displays		
	ACTION PLANS ② Manage Action Plan ③ View Action Plan ▲ Download Action Plan Q Search Action Plans ③ Review Tools Q Lookup Consolidated Plans	PROJECTS  C Add Project C View Projects/Activities  L Download Projects/Activities C Search Projects  C	ACTIVITIES Q. Search Activities 🖶	GRANTEE PROGRAMS	PERFORMANCE REPORTS	GRANTS View Grant Q Search Grants	WORK PLANS  Upload Requests  Manage Requests  Add Assignment  Manage Assignments  Manage Work Plans		



## B. HUD Approval/Rejection of a TA Work Plan

After a Work Plan is submitted in DRGR by a TA Provider User, an appropriate CPD Representative and other HUD staff included in the related grant user group can take review and approval/rejection actions on TA Work Plans with the status of "Submitted." HUD will use the following steps to approve or reject a TA Work Plan in DRGR.

### B1. HUD | Review Work Plan

User Role: HUD User	Menu Option: <b>Q</b> Manage Work Plans				
Purpose: Allow HUD to review a TA Work Plan i	n DRGR.				
Complete the following steps to review a	DRGR Work Plan:				
1       Navigate to the Manage My Grants or m ic select < Manage Work Plans>. The "Manage         1       Manage My Grants         1       Manage My Grants         ACTION PLANS       PROJECTS         If Manage Action Plan       ● Add Project         If Manage Action Plan       ● View Projects/Activities         Image Action Plan       ● View Projects/Activities         Image Action Plan       ● View Projects/Activities         Image Action Plan       ● Search Activities         Image Action Plan       ● Search Projects         Image Activities       ● Search Projects	Con and under the Act Work Plans" page will GRANTEE PROGRAMS Q. Search Grantee Programs Q. Search Grantee Programs Q. Search Grantee Programs	CION Plan menu as described I load. ORMANCE REPORTS tanage Performance Reports arch Performance Reports Search Orants	above and ORK PLANS Upload Requests Add Assignment Manage Assignments Manage Work Plans		
2 On the <b>"Manage Work Plans"</b> page, use t	the "Search Criteria"	to find one or more TA W	ork Plans.		
Alternatively, users can select <b>&lt; Search&gt;</b> with Work Plans. The search results are displayed	hout entering any data d on the same screen. 2-21-TA-VA-0011	a into the search fields to see	a list of all		
Alternatively, users can select <b>&lt; Search&gt;</b> with Work Plans. The search results are displayed Disaster Recovery Grant Reporting System	hout entering any data d on the same screen. z-21-TA-VA-0011	a into the search fields to see	a list of all		
Alternatively, users can select <b>&lt; Search&gt;</b> with Work Plans. The search results are displayed Disaster Recovery Grant Reporting System Manager Work Frank	hout entering any data d on the same screen. Z-21-TA-VA-0011	a into the search fields to see	a list of all		
Alternatively, users can select < Search> with Work Plans. The search results are displayed Disaster Recovery Grant Reporting System Search Criteria - Work Plan Number: Work Plan Number: Work Plan Number: Cated Online	hout entering any data d on the same screen. Z-21-TA-VA-0011 Assignment ID: V Mater Big Tune	a into the search fields to see	a list of all		
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User Role: HUD User						Menu Option: <b>Q</b> Manage Work Plans						
3	The results display key features of the TA Work Plan: "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 allowable Actions based on the user role in the "Action" column.							","TA Date", in the				
	From the "Actions" column, users can view and manage either of the results.											
	Select ead	ch colum	n within	the searc	h results	s to sort the list in	descendi	ing and asce	ending or	der.		
	Use the <	Search>	ink to se	earch for a	ddition	al TA Work Plans.						
	Search Resu	Its 9 CSV Excel										
	Work Plan Number	Grant Number	TA Provider	Primary CPD Rep	Period of Performace	Work Plan Type	Status Last Updated Date	Status Last Updated By	Date Submitted	Status	Actions	
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		-		T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	20	
		÷		T047FOLast T047FOFirst	09/15/2021 - 12/31/2021		02/06/2022	T047FOLast T047FOFirst	02/03/2022	Approved	20	
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4	To view th	ne TA Wo	ork Plan,	click on	actio	٦.						
	Search Resu	Its 9 CSV Excel										
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		•		T047FOLast T047FOFirst	09/13/2021 - 06/30/2024		09/16/2021	T012FOLast T012FOFirst	09/15/2021	Approved	20	
		+		T047FOLast T047FOFirst	09/15/2021 - 12/31/2021		02/06/2022	T047FOLast T047FOFirst	02/03/2022	Approved	20	
		-		T047FOLast T047FOFirst	10/04/2021 - 09/30/2022		10/14/2021	T012FOLast T012FOFirst	10/07/2021	Approved	₫ 0	
		- 0011	Incorporated	T047FOLast	10/05/2021 - 09/30/2022	Support	10/14/2021	T012FOLast	10/07/2021	Approved	20	
5	"View Wo	ork Plan"	page op	ens in a n	ew brov	vser tab.						



User Role: HUD User					٦	Menu C	)ption: <b>Q</b> Mar	nage Wo	rk Plans			
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	TA Provider Name: Last Updated Date: Grant Number: Appropriation Code: Project Number: Project Title: Grantee Program: Work Plan Status:		🗊 Modified - F	ICF Incorporated 06/17/2021 C-18-TA-VA-0011 2018 Departmental Better Buildings Cross-Cutting	W W T/ W Pe Pe Ap W	ork Plan Numbe ork Plan Title: \ Type: ork Plan Type: erformance Peri orformance Peri oproved Work P ork Plan Budge	ər: iod Start Date: od End Date: Ian Budget: t:		ICF-C-18-003	- 003 BBC AM TA TA - On Cal \$ \$	l On-Call TA - Tech Asst Assistance 08/01/2019 12/31/2020 563,500.70 563,600.70	
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						Reset	Search					
	Search Results 35 Copy Print CSV Excel	Cront	74		Deimony	Dariad of		Status Last	Status Last	Data		
	Work Plan Number	Number	Provider	Lead POC	CPD Rep	Performace	Work Plan Type	Updated Date	Updated By	Submitted	Status	Actions
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	ICF-C-18-006 - 006 CN Inform TA	C-18-TA-VA- 0011	ICF Incorporated	TBD	Williams Pamela M	08/01/2019 - 03/31/2021	TA -Direct TA (practitioner support)	08/07/2020	Williams Pamela M	07/21/2020	Approved	<b>₿</b> ⊗
	ICF-C-18-007 - 007 CNI Tools & Products	C-18-TA-VA- 0011	ICF Incorporated	TBD	Williams Pamela M	08/01/2019 - 12/31/2021	TA Developing Web Products	03/05/2021	Williams Pamela M	02/18/2021	Approved	C O
	ICF-C-18-004 - 004 CC18 HUD Exchange	C-18-TA-VA- 0011	ICF Incorporated	TBD	Williams Pamela M	07/20/2019 - 06/30/2022	TA Knowledge Mngmt	06/01/2021	Williams Pamela M	05/28/2021	Approved	Ø
7	On the <b>"Ma</b> "Review Plan window.	nage ″to (	Work	Plan" page, 'Review Wor	, selec <b>k Plan</b>	t T "ti P k	TP: If the <rev hen the HUD permissions to Plan. Navigate pocate the Gran o confirm TA N</rev 	view Plar user doe approve to the N nts menu Work Pla	n> option es not hav e or rejec Manage N u, and sel an user gr	is not re the a t the T Ay Gra ect <v roup pe</v 	available, appropria A Work nts modul iew Grant ermission.	te  e,  >



🖬 Manage Work Plan			🛿 Back 📑 Download 🔮 Add Comments 🛷 Validate Plan 🛷 Review
TA Provider Name:	ICF Incorporated	Work Plan Number:	ICF-C-18-003 - 003 BBC AM On-Call TA
Last Updated Date:	06/17/2021	Work Plan Title:	
Grant Number:	C-18-TA-VA-0011	TA Type:	TA - Tech Asst
Project Number:	Better Buildings	Peformance Period Start Date:	08/01/2019
Project Title:	Cross-Cutting	Peformance Period End Date:	12/31/2020
Grantee Program:		Approved Work Plan Budget:	\$563,500.70
Work Plan Status: <sup>(1)</sup> Modified - Res	ubmit When Ready	Proposed Work Plan Budget:	\$563,600.70
Assignments Scope People/OBLIs	s Tasks	Organizations Financials Documents	Measures Outcomes Surveys History
Review Work Plan			
Review Decision			
* Status:	Select One	;	
Oto to a live to a set			
Comments:	Enter Comm	ents	
			B
			Cancel Save
elect a status from drop do	own and select	<save> to submit the acti</save>	on and comments in DRGR. The Syste
itomatically sends an emain	ail with the H	JD action taken to the TA	A Provider User who created the Wo
u			
elect <b><cancel></cancel></b> to return to	o the previous	screen without saving th	e comments or approval action.

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