

## Chapter 21: Performance Report Review Tools | Manage My Grants Module

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## Chapter 21: Performance Report Review Tools

This Chapter provides guidance for accessing and using the Performance Report **"Review Tools"** page under the **Manage My Grants** module. The Performance Report **"Review Tools"** page is there to help Grantees to conduct Quality Assurance/Quality Control on their Performance Reports. They are accessible to all Grantee users. Grantee and HUD Users do not need Performance Report specific roles to access the **"Review Tools"** page.

TIP! Remember that the Action Plan must be in a "Reviewed and Approved" status in order to submit the Performance Report, and only users with the "Submit Performance Report" role will have access to the <Submit> function. See Chapter 5 for more information on user roles. Ideally Grantees will follow a workflow similar to the one below when submitting a Performance Report. This workflow makes active use of the **"Review Tools"** page to help improve Performance Report submission quality and clarity. Grantees will be using the **"Review Tools"** page to:

- Review summary of Grantee and HUD comments and HUD Supporting Documents,
- Utilize or Complete the Performance Report Review Checklist, and
- Review summary of Active Flags and helpful flag information.

#### Grantee Performance Report Submission and HUD Review Workflow



After the Performance Report submission, HUD Reviewers will either approve or reject the submitted Performance Report. HUD's review will be specific to the Grant appropriation and will focus on the compliance of the QPR with Grant requirements and check for accuracy of information. This review will also be a means for the HUD Reviewer to understand how the Grant program has progressed.



As part of this review, HUD Reviewers may use both the **"Review Tools"** page and, for some features, the main **"Review Performance Report"** page to access "Review Tools" features. HUD users will see the same functionality on their **"Review Tools"** page as Grantees see on their **"Review Tools"** page.

#### PROGRAM PROCESS RECOMMENDATION:

While most Grantees will submit their performance reports on a quarterly cycle and refer to reports as "QPRs" (quarterly performance reports), the reporting cycle and deadline is dependent on Grant appropriation and Grant status.

HUD Reviewers may utilize the following Review Tools features:

- Review summary of Grantee and HUD comments and HUD Supporting Documents,
- Access and complete the Performance Report Checklist, and
- Review summary of Active Flags and helpful flag information.

The Performance Report Review Tools functions are summarized below:

| Feature                     | Subsection | Location   |
|-----------------------------|------------|--|
| Manage Performance Report   | B1         | Summary of Grantee Submission Comments and<br>HUD Review Comments/Supporting Documents |
| 🗭 Manage Performance Report | B2         | Review Checklist   |
| 🗭 Manage Performance Report | B3         | Review Active Flags  |

#### Grantee Users

#### **HUD Users**

| Feature  | Subsection | Location  |
|--|------------|---|
| <ul> <li>Manage Performance Report</li> <li>Review Performance Report</li> </ul> | B1/C1      | Summary of Grantee Submission Comments and HUD Review Comments/Supporting Documents |
| <ul><li>Manage Performance Report</li><li>Review Performance Report</li></ul>    | B3/C1      | Review Checklist  |
| <ul><li>Manage Performance Report</li><li>Review Performance Report</li></ul>    | B4/C1      | Review Active Flags   |



## A. Manage My Grants Module Access

The Manage My Grants module contains all Performance Report Review Tools actions.

## A1. Grantee | User Access

| Use | User Role: Grantee User   |   |                      |  |            | tion: 🏦   | Manage                    | My Grants Module   |
|-----|---|---|----------------------|--|------------|---|---------------------------|--|
| Pui | Purpose: Allow Grantee Users to access Performance Report Review Tools. |   |                      |  |            |   |                           |  |
| 2   | Complete the follow   | ving steps to a   | ccess th             | e Manage N   | My Grants  | module:   |                           |  |
| 1   | In the DRGR System, menu.   | , select the ${\sf N}$  | lanage               | My Grants  | module,    | or 🧰 i  | con, locat                | ed in the navigation   |
|     | CPD   DRGR  | B-11-   | -DN-13-0001          |  | <u>a</u> * | ፹-\$-₫-   | ¢. ⊻. 2                   | Misner Glen<br>TOTTGA  |
| 2   | This opens the dropdo<br>menu items based on                            | own menu iten<br>user type and                                      | ns for th<br>user ro | e <b>Manage N</b><br>les.                          | My Grants  | module. Tl  | he System                 | displays the relevant  |
|     | 💷 Manage My Grants  |   |                      |  |            |   |                           |  |
|     | ACTION PLANS  | PROJECTS <ul> <li>Add Project</li> <li>Q Search Projects</li> </ul> | Ð                    | ACTIVITIES<br>Add Activity<br>Q. Search Activities | ¢          | GRANTEE PROGRAM  G Add Grantee Pro Q Search Grantee I | dS<br>ogram<br>Programs ⊕ | PERFORMANCE REPORTS  C Manage Performance Report  Q Search Performance Reports  Manage Addresses |

## A2. HUD | User Access

| Us | <b>er Role:</b> HUD User   | Menu Option: 🔟 Manage My Grants Module  |  |  |  |  |  |  |
|----|--|---|--|--|--|--|--|--|
| Pu | Purpose: Allow HUD Users to access the Performance Report "Review Tools" page. |   |  |  |  |  |  |  |
| ď  | Complete the following steps to  | o access the Manage My Grants module:   |  |  |  |  |  |  |
| 1  | In the DRGR System, select the navigation menu.                                | e Manage My Grants module, or <u></u> icon, located in the  |  |  |  |  |  |  |
|    |  | B-11-DN-13-0001 ▲ 🛣 🛣 호· 호· 호· 💁 · ♣· Misner, Glen  |  |  |  |  |  |  |
|    |  |   |  |  |  |  |  |  |
| 2  | This opens the dropdown menu relevant menu items based on us                   | items for the <b>Manage My Grants</b> module. The System displays the<br>ser type and user roles. |  |  |  |  |  |  |



| ACTION PLANS                         | PROJECTS          |   | ACTIVITIES          |   | GRANTEE PROGRAMS          |   | PERFORMANCE REPORTS                           |
|--------------------------------------|-------------------|---|---------------------|---|---------------------------|---|---|
| Manage Action Plan                   | Q Search Projects | • | Q Search Activities | • | Q Search Grantee Programs | ۲ | 😰 Manage Performance Report                   |
| <ul> <li>View Action Plan</li> </ul> |                   |   |                     |   |                           |   | <ul> <li>Review Performance Report</li> </ul> |
| 🛓 Download Action Plan               |                   |   |                     |   |                           |   | Q Search Performance Reports                  |
| Q Search Action Plans                | <b>⊕</b>          |   |                     |   |                           |   |   |
| 🔀 Review Tools                       |                   |   |                     |   |                           |   |   |
| Q Lookup Consolidated Plans          | <b>⊕</b>          |   |                     |   |                           |   |   |

## B. Grantee and HUD Performance Report Review Tools

Below is a summary of the various features of the Performance Report **"Review Tools"** page and how to access them. As noted previously, Grantee and HUD users have access to the same Review Tools. Grantees will use them to review Performance Report submissions to ensure quality, and HUD CPD Representatives will use them to review the Grantee's submission to facilitate their review and ensure compliance.

# B1. Grantee and HUD | Summary of Performance Report Submission Comments / Review Comments

| <b>r Role:</b> Grantee   | and HUD  | User   | Menu Item:   | 🔀 Review Tools  |  |   |
|--|--|--|--|---|--|---|
| <b>pose:</b> Allow Us<br>nments, HUD Re  | ers to re<br>view Com  | eview previously nments, and HUD   | entered and s<br>Supporting Doc  | aved Grantee Perfo<br>uments.   | ormance Report s   | ubmission   |
| Complete the<br>cuments:   | followin   | g steps to view  | the submission   | comments, review  | comments, and su   | upporting   |
| and A2 above. S<br>load. Select the  | elect the<br>"Tools"<br>load   | <manage perforr<br="">icon in the "Acti</manage>   | mance Report> li<br>on" column nex   | nk. The <b>"Manage Pe</b><br>t to the desired rep   | rformance Report"<br>porting period. The   | page will<br><b>"Review</b>   |
| Disaster Recovery Gran   | it Reporting Syste   | em   | Missouri   P-18-MC-20-HiM1   | ۵   | 脅 血-\$- 亟- <b>(}- ⊻</b> -  | <b>≜</b> - ∎ack   |
| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pe<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:  | It Reporting Syst  | em<br><b>Ce Reports</b><br>P-18-MO-29-<br>Mis<br>2017<br>2017<br>Modified - Resubmit When F<br>A   | Missouri (P-18-MO-29-HIM1<br>HIM1<br>ssouri<br>7 HIM<br>Ready<br>Active  | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:   | ★ 血、 、 血、 使、 止、 \$0.00 \$68,382,018.00 \$68,382,018.00 \$68,382,018.00   | € - (Back   |
| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pee<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Grant Status:<br>Breports by Reporting F   | eriod 7  | em<br><b>ce Reports</b><br>P-18-MO-29-<br>Mis<br>2017<br>Modified - Resubmit When F<br><i>A</i>  | Missouri   P-18-MO-29-HIM1<br>HIM1<br>ssouri<br>7 HIM<br>Ready<br>Active   | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:   | <ul> <li>☆ 血- \$- 直- €- 坐-</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> </ul>  | ▲-<br>(Back   |
| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pee<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Grant Status:<br>Reports by Reporting F<br>Reporting Period  | nt Reporting Syst<br>rforman<br>'eriod 7<br>Due Date   | em<br><b>ce Reports</b><br>P-18-MO-29-<br>Mis<br>2017<br>Modified - Resubmit When F<br>A<br>Original Submission Date   | Missouri   P-18-MO-29-HIM1<br>HIM1<br>ssouri<br>7 HIM<br>Ready<br>Active   | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:   | ★ 血・ 、 心・ 、 ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・  | ▲ • Back  |
| Disaster Recovery Grad<br>Disaster Recovery Grad<br>Manage Pee<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Reports by Reporting P<br>Reporting Period<br>04/01/2021 - 06/30/2021  | 1t Reporting Syst<br>rforman<br>'eriod 7<br>Due Date<br>07/30/2021   | em<br><b>ce Reports</b><br>P-18-MO-29-<br>Mis<br>2017<br>Modified - Resubmit When F<br>A<br>Original Submission Date   | Missouri   P-18-MO-29-HIM1<br>HIM1<br>Securi<br>Active<br>Latest Submission Date   | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:<br>Report Status<br>Original - In Progress  | <ul> <li>☆ 血- \$- 直- €- 坐-</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> </ul>                                   | Actions   |
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| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pee<br>Grant Number:<br>Grantee Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Grant Status:<br>Reporting Period<br>Adv01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020   | 1t Reporting Syst<br>Prforman<br>'eriod 7<br>Due Date<br>07/30/2021<br>04/30/2021<br>01/30/2021  | em  ce Reports  P-18-MO-29- Mis 2017  Mis 2017  Modified - Resubmit When F  Original Submission Date  Original Submission Date  Od/23/2021 0d/13/2021  | Missouri   P-18+MO-29+HIM1<br>HIM1<br>ssouri<br>P HIM<br>Ready<br>Active<br>Latest Submission Date<br><br>04/23/2021<br>04/13/2021   | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:<br>Report Status<br>Original - In Progress<br>Submitted - Await for Review<br>Submitted - Await for Review  | <ul> <li>★ 血・ \$・ 亞・ ◆・ ★・</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> </ul>                   | L →<br>+ Back<br>Actions<br>L ⊘ ⊕<br>L ⊘ ⊕<br>L ⊘ ⊕   |
| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pee<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Reports by Reporting P<br>Reporting Period<br>04/01/2021 - 06/30/2021<br>01/01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020<br>07/01/2020 - 09/30/2020           | 1t Reporting Syst<br>Prforman<br>Veriod 7<br>Due Date<br>07/30/2021<br>04/30/2021<br>01/30/2021<br>10/30/2020  | em  Ce Reports  P-18-MO-29- Mis 2017  Mis 2017  Modified - Resubmit When F  Original Submission Date  Od/23/2021  Od/23/2021  Od/13/2021  Od/13/202  Od/13/202  Od/13/202  Od/13/20  Od/13/2  Od/ | Missouri   P-18-MO-29-HIM1<br>HIM1<br>ssouri<br>7 HIM<br>Ready<br>Active<br>Latest Submission Date<br><br>04/23/2021<br>04/13/2021   | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:  Report Status Original - In Progress Submitted - Await for Review Submitted - Await for Review Submitted - Await for Review  | <ul> <li>☆ 血・ \$・ 亞・ ◆・ ★・</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> </ul>          | ▲ -<br>+ Back<br>Actions<br>▲ ☆ @<br>▲ ♡ @<br>▲ ♡ @<br>▲ ♡ @<br>▲ ♡ @<br>▲ ♡ @  |
| Disaster Recovery Gran<br>Disaster Recovery Gran<br>Manage Pee<br>Grant Number:<br>Grante Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Reporting Period<br>04/01/2021 - 06/30/2021<br>01/01/2020 - 12/31/2021<br>01/01/2020 - 12/31/2020<br>07/01/2020 - 06/30/2020<br>04/01/2020 - 06/30/2020          | It Reporting Syst           erforman           'eriod 7           Due Date           07/80/2021           04/30/2021           04/30/2021           10/30/2021           01/30/2020           07/30/2020 | em   | HIM1           ssouri           P-18-MO-29-HIM1  | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:      Report Status      Original - In Progress      Submitted - Await for Review      Submitted - Await for Review      Submitted - Await for Review  | <ul> <li>☆ 血・ \$・ 亞・ ◆・ ★・</li> <li>\$0.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> <li>\$68,382,018.00</li> <li>Final Performance Report</li> </ul> | ▲.<br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br>< |
| Disaster Recovery Grave Manage Description Provide America Appropriation Code:<br>Action Plan Status:<br>Grant Status:<br>Grant Status:<br>Grant Status:<br>Grant Status:<br>Reporting Period<br>04/01/2021 - 06/30/2021<br>01/01/2020 - 12/31/2020<br>07/01/2020 - 03/31/2020<br>0/01/2020 - 03/31/2020<br>0/01/2020 - 03/31/2020 | It Reporting Syst           It Reporting Syst           It rforman           Due Date           07/30/2021           04/30/2021           01/30/2021           01/30/2020           04/30/2020           | em   | HIM1           ssouri           HIM1           ssouri           HIM2           Latest Submission Date              04/23/2021           04/13/2021           04/13/2021           04/13/2021           04/13/2021           04/24/2020 | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds<br>Total Budget:      Report Status      Original - In Progress     Submitted - Await for Review     Submitted - Await for Review | ★ 血・ シ・ 心・ 坐・ と・ \$0.00 \$68,382,018.00 \$68,382,018.00 \$68,382,018.00 Final Performance Report   | ▲<br>< Back<br>Actions<br>▲ 次 @<br>▲ 次 @<br>▲ ♡ @<br>▲ ♡ @<br>▲ ♡ @   |



2 As described in Chapter 22 – Performance Report Submission and Approval, Grantees may submit comments to HUD along with their submission of the Performance Report. Any saved Grantee submission comments will be displayed on the **"Review Tools"** page. HUD recommends including submission comments with each Performance Report submission. If the Submission Comments section displays "none," then no Submission Comments have been entered and saved.

| Grant No<br>B-08-MN | imber:<br>27-0001           |
|---------------------|-----------------------------|
| Grantee<br>Minneapo | Name:<br>lis, MN            |
| Grante              | e submission Comments       |
| None                |                             |
| HUD R               | eview Comment:              |
| None                |                             |
| HUD R               | eview Supporting Documents: |
| None                |                             |
| Perfori<br>None     | nance Benchmarks            |
| Review              | Checklist<br>hecklist       |
| Flags               |                             |
| Active              | QPR Flags:                  |
| None                |                             |
| Active              | Project and Activity Flags: |
| None                |                             |

3 Similarly, HUD reviewers may provide comments and supporting documents in response to their review and approval or rejection of a Grantee's submitted Performance Report. A summary of HUD's comments and the supporting documents can be accessed from the "**Review Tools**" page. See Chapter 22 – Performance Report Submission and Approval for HUD's review steps.



| teview Tools                                     |
|--|
| Jan 1, 2020 thru Mar 31, 2020 Performance Report |
| -08-MN-27-0001                                   |
| irantee Name:<br>linneapolis, MN                 |
| Grantee submission Comments                      |
| None   |
| HUD Review Comment:                              |
| None   |
| HUD Review Supporting Documents:                 |
| None   |
| 'erformance Benchmarks                           |
| None   |
| Leview Checklist<br>Review Checklist             |
| lags   |
| Active QPR Flags:                                |
| None   |
| Active Project and Activity Flags:               |
| None   |

#### **B2.** Performance Report Review Checklist

The Performance Report Checklist allows Grantees and HUD to review Performance Reports using a semiautomated checklist. The Checklist includes a series of questions, some of which will have DRGR-calculated answers. This allows Grantees to identify some issues with the Performance Report submissions that would be highlighted by the HUD CPD representative in its review. By using the checklist prior to submission, the Grantee is able to address concerns before they arise in HUD's review, thereby ensuring a faster approval.

| User Role: Grantee and HUD User   | Menu Item: 🔀 Review Tools  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|
| Purpose: Allow Grantee and HUD User access to t   | Purpose: Allow Grantee and HUD User access to the Performance Report Checklist.  |  |  |  |  |  |  |  |
| Complete the following steps to view the "R   | eview Checklist" page:   |  |  |  |  |  |  |  |
| 1 Navigate to the Manage My Grants module a<br>and A2 above. Select <manage performance<br="">Select the <review tools=""> link in the "Action<br/>Tools" page will load.</review></manage> | and locate the <b>Performance Reports</b> menu. See Sections A1<br><b>Report&gt;</b> . The <b>"Manage Performance Report"</b> page will load.<br>" column next to the desired reporting period. The <b>"Review</b> |  |  |  |  |  |  |  |



#### Chapter 21: Performance Report Review Tools | Manage My Grants Module

| Disaster Recovery Gran  | t Reporting Syst                       | tem                                    | Missouri   P-18-MO-29-HIM1 | ۵   | 斧 血- \$- 亟- €- 堂-        | <b>1</b> -         |
|---|--|--|----------------------------|---|--------------------------|--------------------|
| 🟛 Manage Pe   | rforman                                | ce Reports                             |                            |   |                          | ∢ Ba               |
| Grant Number:   |  | P-18-MO-29                             | 9-HIM1                     | LOCCS Authorized Amount:                              | \$0.00                   |                    |
| Grantee Name:   |  | Μ                                      | lissouri                   | Grant Award Amount:                                   | \$68,382,018.00          |                    |
| Appropriation Code:   |  | 20                                     | 17 HIM                     | Total Estimated PI/RL Funds:                          | \$0.00                   |                    |
| Action Plan Status:   |  | Modified - Resubmit When               | n Ready                    | Total Budget:   | \$68,382,018.00          |                    |
| Grant Status:   |  |  | Active                     |   |                          |                    |
| Reports by Reporting P<br>Reporting Period                                    | eriod 7<br>Due Date                    | Original Submission Date               | Latest Submission Date     | Report Status   | Final Performance Report | Actions            |
| 04/01/2021 - 06/30/2021   | 07/30/2021                             |  |                            | Original - In Progress                                |                          | ₹ <mark>×</mark> 0 |
| 01/01/2021 - 03/31/2021   | 04/30/2021                             | 04/23/2021                             | 04/23/2021                 | Submitted - Await for Review                          |                          | ± 🛙 0              |
| 10/01/2020 - 12/31/2020   | 01/30/2021                             | 04/13/2021                             | 04/13/2021                 | Submitted - Await for Review                          |                          | 🛓 🗹 🥹              |
|   |  | 0.1/12/2021                            | 04/13/2021                 | Submitted - Await for Review                          |                          | ± 🗷 🛛              |
| 07/01/2020 - 09/30/2020   | 10/30/2020                             | 04/13/2021                             | 04/10/2021                 |   |                          |                    |
| 07/01/2020 - 09/30/2020<br>04/01/2020 - 06/30/2020                            | 10/30/2020<br>07/30/2020               | 07/31/2020                             | 07/31/2020                 | Submitted - Await for Review                          |                          | 🛓 🗹 🥹              |
| 07/01/2020 - 09/30/2020<br>04/01/2020 - 06/30/2020<br>01/01/2020 - 03/31/2020 | 10/30/2020<br>07/30/2020<br>04/30/2020 | 04/13/2021<br>07/31/2020<br>04/24/2020 | 07/31/2020<br>04/24/2020   | Submitted - Await for Review<br>Reviewed and Approved |                          | ± 00               |

2 On the **"Review Tools"** page, users will find the **<Review Checklist>** link. Select this link to open the Review Checklist in a new tab or page.

**Review Tools** 

## Jan 1, 2020 thru Mar 31, 2020 Performance Report

| Grant Number:<br>B-08-MN-27-0001   |   |
|------------------------------------|---|
| Grantee Name:<br>Minneapolis, MN   |   |
| Grantee submission Comments        | _ |
| None                               |   |
| HUD Review Comment:                |   |
| None                               |   |
| HUD Review Supporting Documents:   |   |
| None                               |   |
| Performance Benchmarks None        | _ |
| Review Checklist                   |   |
| Review Checklist                   | _ |
| Flags                              |   |
| Active QPR Flags:                  |   |
| None                               |   |
| Active Project and Activity Flags: |   |
| None                               |   |
|                                    |   |



3 The Review Checklist is customized to each appropriation. Many questions will have "yes" or "no" responses while some request figures. Other questions provide an opportunity for comment. The Review Checklist legend shows icons that help to describe each type of question on the Checklist. The "Review Checklist Legend Icons" table below describes each icon in the legend.

| Grant Number: 8-08-MN-27-0001   |          | LEGEND:  |
|---------------------------------|----------|--|
| Status                          | Sequence | Question/Answer and User Choices   |
| Section: Areas of Greatest Need |          |  |
|                                 |          |  |
| ≌ x <del>*</del> x              | 1        | Does the submission identify a neighborhood or neighborhoods as being areas of greatest<br>need with an individual or average combined index score for the grantees identified target<br>geography that is not less than the lesser of 17 or the 20th percentile most needy score in an<br>individual state 2  |
| ■ k•\$                          | 1        | Does the submission identify a neighborhood or neighborhoods as being areas of greatest<br>need with an individual or average combined index score for the grantees identified target<br>geography that is not less than the lesser of 17 or the 20th percentile most needy score in an v<br>individual eters?<br>Yes  |
| ₿ ,¥*\$.                        | 1        | Does the submission identify a neighborhood or neighborhoods as being areas of greatest<br>need with an individual or average combined index score for the grantees identified target<br>geography that is not less than the lesser of 17 or the 20th percentile most needy score in an v<br>individual etate?<br>Yes<br>No  |
| ■ k*ż                           | 1        | Does the submission identify a neighborhood or neighborhoods as being areas of greatest need with an individual or average combined index score for the grantees identified target         geography that is not less than the lesser of 17 or the 20th percentile most needy score in an verage individual etere?         Yes         No         Verification on Page |
| ■ <i>i</i> **i                  | 1        | Does the submission identify a neighborhood or neighborhoods as being areas of greatest need with an individual or average combined index score for the grantees identified target         geography that is not less than the lesser of 17 or the 20th percentile most needy score in an verage         Yes         No         Verification on Page         Comments: |

#### **Review Checklist Legend Icons**

| ICON                          | DESCRIPTION   |
|-------------------------------|---|
| 🖄 — ОК                        | The "OK" icon indicates that a question has been satisfied and no further action is needed.   |
| 🛕 — Warning                   | The "Warning" icon indicates that action is needed to ensure compliance.<br>Questions that are mandatory and do not have a response will be displayed<br>with a warning icon.   |
| 🖬 — Pre-calculated            | The "Pre-calculated" icon indicates questions that are auto computed by the<br>System. If a response to a checklist question is auto computed, then the<br>System displays a non-editable answer. Although auto computed responses<br>may not be edited, the user can add comments. |
| <b>ंन्ध्रे</b> — Manual Input | The "Manual Input" icon indicates questions that are not auto computed and need to be completed manually.   |



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| . View Supporting Data | The "View Supporting Data" icon indicates questions that have been<br>configured to display the supporting data associated with the question's<br>auto-computed responses. On selection of this icon, the System will open a<br>new window to display the supporting data. |
|------------------------|--|
| \star — Mandatory      | The "Mandatory Questions" icon indicates questions that must be answered before submission.  |

## **B3. Review Active Flags**

Т

| pose: Allow Grantee and HUD Users to review summaries of Active Flags.         Complete the following steps to view the Active Performance Report Flags:         Navigate to the Manage My Grants module and locate the Performance Reports menu. See Sections and A2 above. Select <manage performance="" report="">. The "Manage Performance Report" page will loc Select the "Tools" icon in the "Action" column next to the desired reporting period. The "Review Tool page will load.         Image Deformance Reports       Mescuri P=18-MO-29-HIM1         Image Performance Reports       Image Performance Reports         Image Performance Reports       P=18-MO-29-HIM1         Image Performance Reports       Image Performance Reports         Image Performance Reports       Image Performance Reports         Image Performance Reports       Image Performance Reports         Image Reporting System       Mescuri P=18-MO-29-HIM1         Image Reporting System       Image Report Reporting System         Image Reporting Reporting System       P=18-MO-29-HIM1         Image Reporting Report Reports       Image Report Report</manage>   |   |   |  |  |  |  |  |
|--|---|---|--|--|--|--|--|
| Complete the following steps to view the Active Performance Report Flags:         Navigate to the Manage My Grants module and locate the Performance Reports menu. See Sections and A2 above. Select          Analysis and A2 above. Select          Select the "Tools" icon in the "Action" column next to the desired reporting period. The "Review Too page will load.         Image: Disaster Recovery Grant Reporting System         Image Performance Reports       New Image: Pris-MO-29-HilMi         Image Performance Reports       Sector Secto | <b>bose:</b> Allow Gra  | ntee and  | HUD Users to re                                      | eview summaries  | of Active Flags.   |  |  |
| Navigate to the Manage My Grants module and locate the Performance Reports menu. See Sections and A2 above. Select <manage performance="" report="">. The "Manage Performance Report" page will lo Select the "Tools" icon in the "Action" column next to the desired reporting period. The "Review Too page will load.</manage>   | Complete the  | following   | g steps to view t                                    | he Active Perforn  | nance Report Flags:  |  |  |
| Disaster Recovery Grant Reporting System       Missouri [P-18-MO-29-HIM1]       ▲ ① ◆ ① ◆ ◇ ① ◆ ◆ ◆ ◆ ▲ ◆         Image Performance Reports       Grant Number:       P-18-MO-29-HIM1       LOCCS Authorized Amount:       \$0.00         Grante Name:       Missouri       Grant Award Amount:       \$68,382,018.00         Appropriation Code:       2017 HIM       Total Estimated PI/RL Funds:       \$0.00         Action Plan Status:       Image:       \$68,382,018.00       Total Budget:       \$68,382,018.00         Grant Status:       Active       Active       Image:       \$68,382,018.00       Image:         Reports by Reporting Period ?       Image:       Image:       \$68,382,018.00       Image:       \$68,382,018.00   | Navigate to the<br>and A2 above.<br>Select the "Toc<br>page will load.  | Manage<br>Select <b><n< b=""><br/>Is" icon i</n<></b> | My Grants mod<br>lanage Perform<br>n the "Action" of | dule and locate ti<br><b>ance Report&gt;</b> . Th<br>column next to th | ne <b>Performance Repo</b><br>e <b>"Manage Performar</b><br>ne desired reporting p               | orts menu. See Se<br>nce Report" page<br>period. The <b>"Revie</b> | ctions A<br>will load<br><b>ew Tools</b> |
| Grant Number:       P-18-MO-29-HIM1       LOCCS Authorized Amount:       \$0.00         Grant Number:       Missouri       Grant Award Amount:       \$68,382,018.00         Appropriation Code:       2017 HIM       Total Estimated PI/RL Funds:       \$0.00         Action Plan Status:       Modified - Resubmit When Ready       Total Budget:       \$68,382,018.00         Grant Status:       Active       Total Budget:       \$68,382,018.00  | CPD   Disaster Recovery Gra   | nt Reporting Syst                                     | tem  | Missouri   P-18-MO-29-HIM1   | · · · · · · · · · · · · · · · · · · ·  | 斧 血- \$- 弧- 6- 坐-  | <b>4</b> -                               |
| Grant Number:     P-18-MO-29-HIM1     LOCCS Authorized Amount:     \$0.00       Grant Awared Amount:     \$68,382,018.00       Appropriation Code:     2017 HIM     Total Estimated PI/RL Funds:     \$0.00       Action Plan Status:     @ Modified - Resubmit When Ready<br>Grant Status:     Total Budget:     \$68,382,018.00       Grant Status:     Active     Active     Integration Code:     \$68,382,018.00  | 🧰 Manage Pe   | erforman  | ce Reports   |  |  |  | < Bac                                    |
| Reports by Reporting Period <b>7</b>   | Grant Number:<br>Grantee Name:<br>Appropriation Code:<br>Action Plan Status:<br>Grant Status:                                       |   | P-18-MO-2<br>I<br>20<br>Modified - Resubmit Whe      | 29-HIM1<br>Missouri<br>017 HIM<br>n Ready<br>Active                    | LOCCS Authorized Amount:<br>Grant Award Amount:<br>Total Estimated PI/RL Funds:<br>Total Budget: | \$0.00<br>\$68,382,018.00<br>\$0.00<br>\$68,382,018.00             |  |
| Reports by Reporting Period 7  |   |   |  | <i>b</i> <sup>3</sup>  |  |  |  |
| Reporting Period Due Date Original Submission Date Latest Submission Date Report Status Final Performance Report Actions_  | Reports by Reporting<br>Reporting Period  | Period 7<br>Due Date                                  | Original Submission Date                             | Latest Submission Date   | Report Status  | Final Performance Report   | Actions                                  |
| 04/01/2021 - 05/30/2021 07/30/2021 Original - In Progress  | 04/01/2021 - 06/30/2021   | 07/30/2021  |  |  | Original - In Progress   |  | <b>₹ %</b> ⊙                             |
| 01/01/2021 - 03/31/2021 04/30/2021 04/23/2021 04/23/2021 Submitted - Await for Review  | 04/01/2021 - 00/30/2021   | 04/30/2021  | 04/23/2021   | 04/23/2021   | Submitted - Await for Review   |  | 1 🗹 🛛                                    |
| 10/01/2020 - 12/31/2020 01/30/2021 04/13/2021 04/13/2021 Submitted - Await for Review 🛓 🗹  | 01/01/2021 - 03/31/2021   | 01/30/2021  | 04/13/2021   | 04/13/2021   | Submitted - Await for Review   |  | 🛓 🗹 🛛                                    |
| 07/01/2020 - 09/30/2020 10/30/2020 04/13/2021 04/13/2021 Submitted - Await for Review 🛓 🗹  | 01/01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020  | 10/30/2020  | 04/13/2021   | 04/13/2021   | Submitted - Await for Review   |  | 🛓 🗹 🎯                                    |
| 04/01/2020 - 06/30/2020 07/30/2020 07/31/2020 07/31/2020 07/31/2020 Submitted - Await for Review   | 01/01/2021 - 03/31/2021<br>01/01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020<br>07/01/2020 - 09/30/2020                            | 07/30/2020  | 07/31/2020   | 07/31/2020   | Submitted - Await for Review   |  | ± 🗹 🛛                                    |
| 01/01/2020 - 03/31/2020 04/30/2020 04/24/2020 04/24/2020 Reviewed and Approved 🛓 🛇   | 01/01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020<br>07/01/2020 - 09/30/2020<br>04/01/2020 - 06/30/2020                            |   | 04/24/2020   | 04/24/2020   | Reviewed and Approved  |  | 盘 ⊘⊛                                     |
| 10/01/2019 - 12/31/2019 01/30/2020 01/30/2020 01/30/2020 Reviewed and Approved 🛓 🛇   | 01/01/2021 - 03/31/2021<br>10/01/2020 - 12/31/2020<br>07/01/2020 - 09/30/2020<br>04/01/2020 - 06/30/2020<br>01/01/2020 - 03/31/2020 | 04/30/2020  |  |  |  |  |  |

2 The **"Review Tools"** page provides a summary of all Active Performance Report Flags and "Active Project and Activity Flags." Summary view only information is provided for each active flag. Detailed steps related to a Grantee's resolving and remediating of active flags and HUD's comments on active flags are described in Chapter 32 – Compliance: Flags. Grantees should resolve or remediate flags prior to submitting the Performance Report.



| Flag Subcategory Flag Le | l Flag Type | Flag Criteria            | Flag Status | Flagged Since |
|--------------------------|-------------|--------------------------|-------------|---------------|
|                          |             | PLANNING CAP EXCEEDED DR |             | 08/04/2019    |

## C. HUD Alternate Access to Review Tools

As described above, both Grantees and HUD CPD Representatives use the Review Tools features to assist in their roles. Grantees use the tools to ensure a quality submission. HUD CPD Representatives use the tools to facilitate their review and ensure compliance. In addition to accessing the Review Tools features from the **"Review Tools"** page as described in Section B above, HUD Users will access the **"QPR Review"** page to change the status of a submitted Performance Report to Approved or Rejected.

Note the difference between HUD's use of the "QPR Review" page and the "Review Tools" page.

- The "QPR Review" page is the page that loads after selecting the <Review> link from the "Manage Performance Reports" page. On the "QPR Review" page, HUD Users approve or reject the Performance Report, enter review comments, and add supporting documents. They may also access the Performance Report Review Checklist and Flags.
- In contrast, the **"Review Tools"** page provides a summary of all Grantee and HUD user review actions.

#### C1. Access to Review Tools from the Review QPR Page

| User Role: HUD User   | Menu Item: <a> <li>Review Performance Report</li> </a>  |
|---|---|
| Purpose: Allow HUD Users to access Review Tools fro   | om the <b>"Review QPR"</b> page.  |
| Complete the following steps to access Review   | Tools from the "Review QPR" page:   |
| <ol> <li>Navigate to the Manage My Grants module and<br/>See Section A1 and A2 above. Select <review pe<br="">load.</review></li> </ol> | locate the <b>Manage Performance Reports</b> menu.<br>erformance Reports>. The "Review QPR" page will |



2 The process for entering review comments and changing the status of the Performance Report are discussed in detail in Chapter 22 – Performance Report Submission and Approval. In addition to these functions, the "Review QPR" page includes direct access to certain Review Tools. On the "Review QPR" page, the HUD CPD Representative will find: (a) a summary of Checklist items to review with <Edit> links that direct the reviewer to the Checklist, and (b) the ability to search for active flags to provide comments.

|   | NTC IN CURPORT OF   | DEVIEW   |   |  |   |  |
|---|---|--|---|--|---|--|
| D DOCOMEN   | NTS IN SUPPORT OF   | REVIEW   |   |  |   |  |
| porting Docume  | ents * Valid file extensions an   | re: .png .glf .jpg .jpeg .doc .docx .  | .xls .xlsæ .ppt .ppts .pdf                          |  |   |  |
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| FLAGS<br>Search Activit   | Activity Progress Review NSP 1 Specific Requirement Ities For Adding Comme Hagged Activities:   | ents OR project Number:  | Grantee Activity Number:                            | Neviry Comments  |   |  |
| FLAGS<br>Search Activit   | Activity Progress Review NSP 1 Specific Requirement ties For Adding Comme Hagged Activities: Select   | ents OR Project Number:  | Grantee Activity Number:                            | Neviry Comments:<br>Select V                                 |   |  |
| FLAGS<br>Search Activit   | Attivity Progress Roades NSP 1 Specific Requirement ties For Adding Comme Hagged Activities: Select   | Edit   | Grantee Activity Number:                            | Newley Connectes<br>Select Q                                 | b |  |
| FLAGS<br>Search Activit   | Activity Progress Roaden     NSP 1 Specific Requirement     Second Activities:     Second Activities:     Second      Imaged Activities:     Second      Seco     | OR Left ents OR Project Rumber: Tray Criteria: Enty | Grantee Activity Number:                            | Neview Comments:<br>Select III                               | b |  |
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| Gearch Activity     Gearch Activity     Gearch Activity     Gearch Activity     Gearch Activity     Gearch Activity   | Attrictly Progress Review     Model     Key 1 Specific Requirement     Hagged Activities:     Select          | Index       Intervention       OR       Project Rumber:       Intervention       Ray Griteria:       Select  | Grantee Activity Number:                            | Neview Comments<br>Select V<br>Filed Type:<br>Select V       | b |  |
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| Search Activity     Search Activity     O Record(s) No is     No records are fou     India Activity Con   | Activity Progress Routing     KNP 1 Specific Requirement      Kies For Adding Comme      Plagged Activities:     Select      Select     Select      I Display All Plagged Item more Record(s) on this page and.  rements  | ents OR Project Rumber: Tau Criteria: Select   | Grantee Activity Number:                            | Neview Comments:<br>Select III<br>Select IIII<br>Select IIII | b |  |
| Search Activity<br>Gearch Activity<br>0 Record(s) No m<br>No records are four<br>juitt Activity Con   | Attributy Progress Rowley  NSP 1 Specific Requirement  Ities For Adding Comme  Itiged Activities: Select Select Ities SubCategory: Select Ities SubCategory: Select Ities To Display All Plagged Iterr more Record(s) on this page and.  Iterments  | Internet     Internet       OH     Project Rumber:       DH     Criteria:       Data Criteria:     Select V  | Grantee Activity Number:<br>Flag Level:<br>Salect   | Heviny Comments:<br>Select V<br>Flag Type:<br>Select V       | b |  |