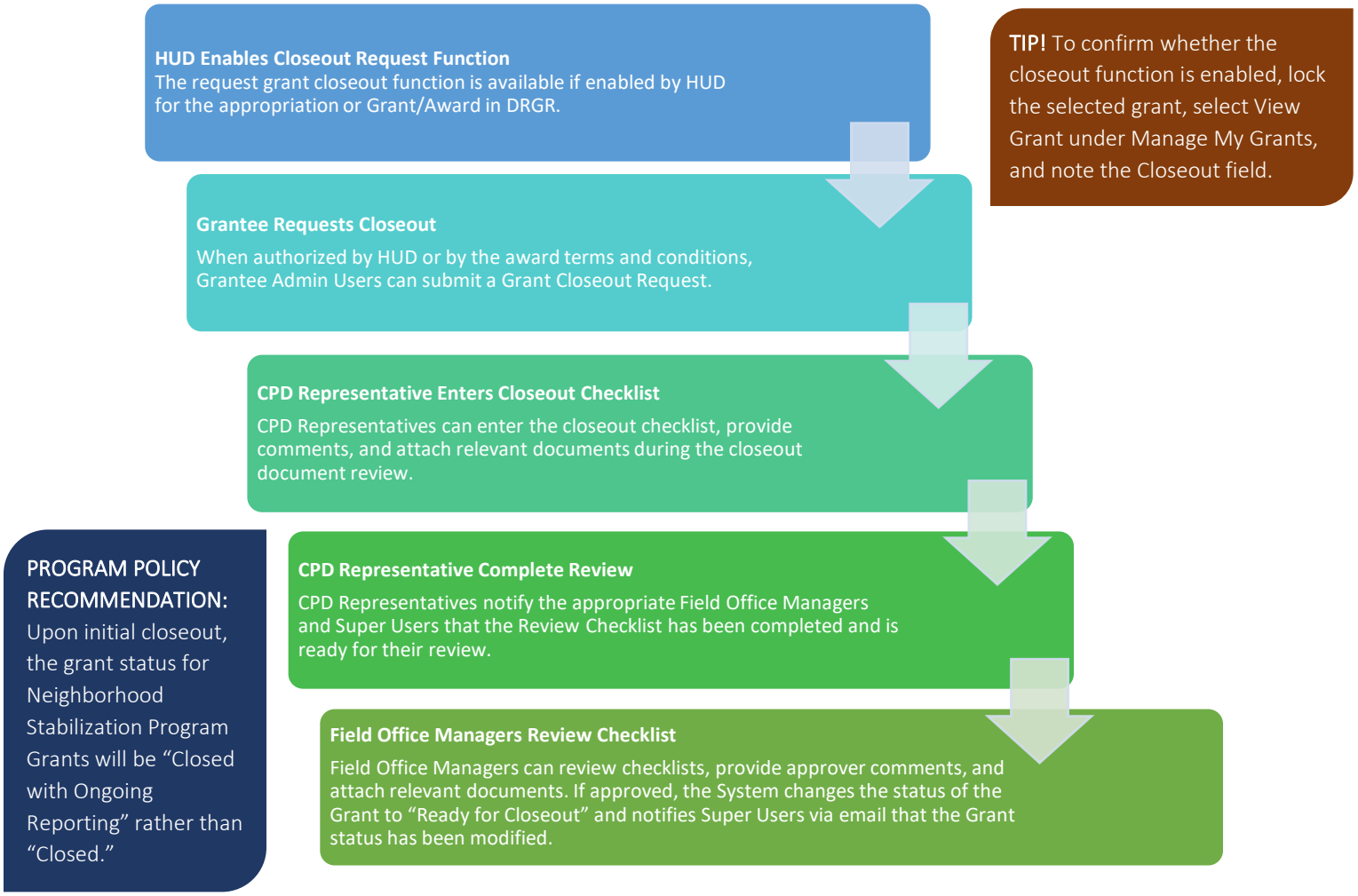
Chapter 31: Closeout| Manage My Grants Module

Chapter 31: Closeout | Manage My Grants Module 1
A. Manage My Grants Module Access 2
A1. Grantee | Grants 2
A2. HUD | Grants 3
B. Grantee | Request Grant Closeout 3
C. HUD | Review Closeout Checklist 6
C1. HUD | CPD Representative Closeout Checklist Review and Approval 6
C2. HUD | Field Office Manager or Super User Checklist Review and Approval 8
D. Grantee and HUD | View Review Checklist 10

Chapter 31: Closeout | Manage My Grants Module

This Chapter describes the workflow for Grantee Users and HUD Users to review and closeout a Grant in DRGR.



This Chapter describes actions for Grantee Users and HUD Users, and is divided into subsections. The following actions are covered in this section:

Grantee Users

Menu Option	Subsection	Action
Closeout Grant	B	Request Grant closeout
View Grant	D	View only access to review closeout checklist

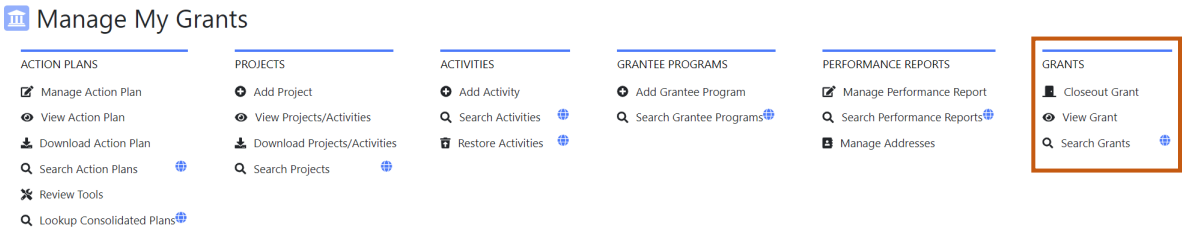
HUD Users

Menu Option	Subsection	Action
Closeout Grant	C	Access review checklist for Grants
View Grant	D	View only access to review closeout checklist

A. Manage My Grants Module Access

The **Manage My Grants** module contains access to Grants.

A1. Grantee | Grants

User Role: Grantee User	**Menu Option:** Manage My Grants Module
Purpose: Allow Grantee Users to access Grant actions.	
Complete the following steps to access the Manage My Grants Module:	
1 In the DRGR application, navigate to the **Manage My Grants** module or icon, located in the Navigation Bar.	
2 This opens the dropdown menu items for the **Manage My Grants** module with various subheadings. The **Grants** menu appears to the very right of the dropdown menu. The System displays the relevant menu items based on user type and user roles. 	

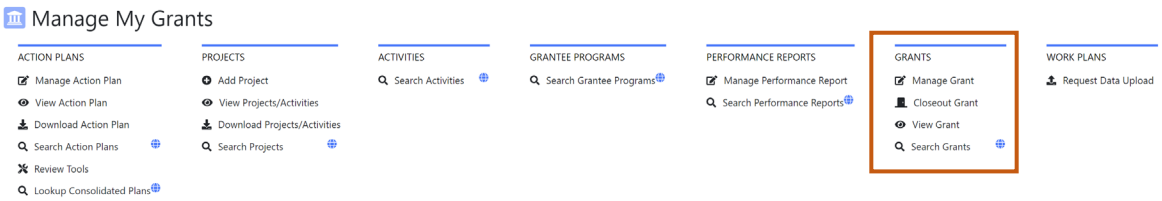
A2. HUD | Grants

User Role: HUD User	**Menu Option:** Manage My Grants Module
Purpose: Allow HUD Users to access Grant actions.	

Complete the following steps to access the Grant Management: Grants Module:

1 In the DRGR application, navigate to the **Manage My Grants** module, or icon, located in the Navigation Bar.

2 This opens the dropdown menu items for the **Manage My Grants** module with various subheadings. The Grants menu appears to the right of the very right of the dropdown menu. The System displays the relevant menu items based on user type and user roles.



B. Grantee | Request Grant Closeout

If HUD has enabled the functionality for the Grant, Grantee Users with the Administrator role can proactively initiate the Grant closeout process by submitting a Grant Closeout Request. See Chapter 5 – User Management and Certifications for more information on user roles.

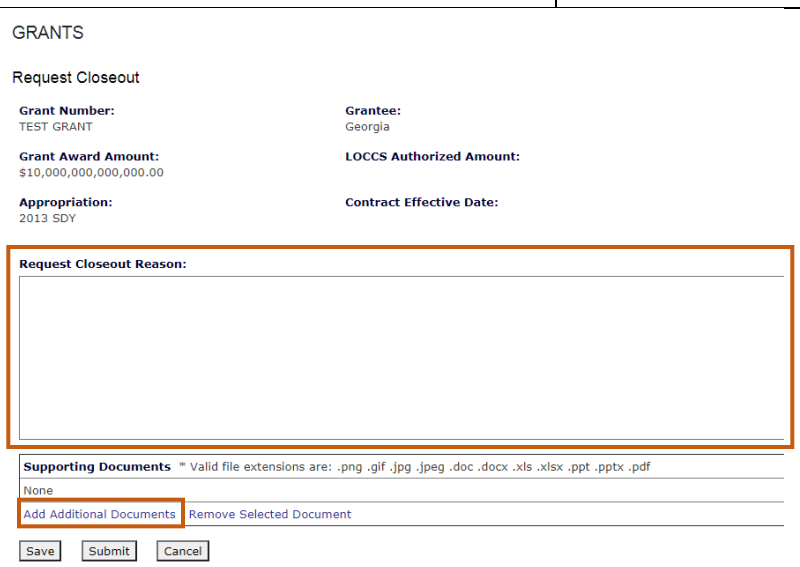
User Role: Grantee User	**Menu Option:** Closeout Grant
Purpose: Allow Grantee Users to initiate the Grant closeout process.	

Complete the following steps to request Grant closeout:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Request Closeout"** page will load for the "Selected Grant" in the Navigation Bar.

2 On the **"Closeout Grant"** page, Grantee Users enter comments in the text box under "Request Closeout Reason." Supporting Documents are attached using the **<Add Additional Documents>** link.

User Role: Grantee User	**Menu Option:** Closeout Grant

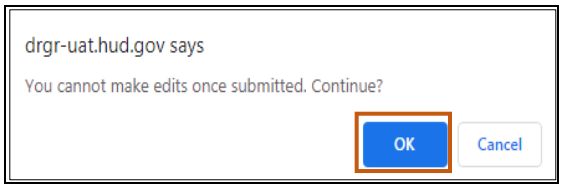


3 The Grantee User can select **<Save>** to save their comments and attachments and continue the process at a later time. Selecting **<Submit>** submits the comments and attachments for CPD Representative or Field Office User review. Selecting **<Cancel>** will close the window without saving any comments or attached supporting documents.

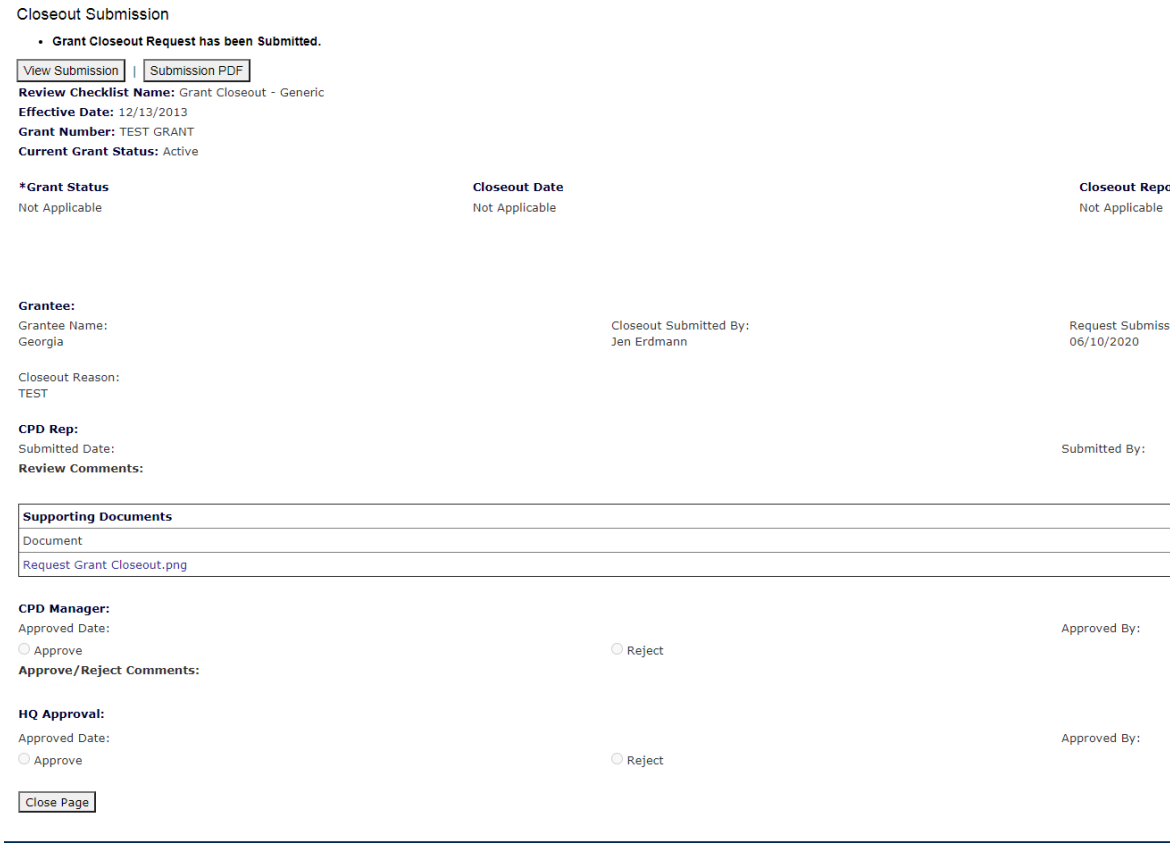
TIP! After selecting **<Submit>,** the user can neither make additional edits, nor submit again. They can, however, view their submission and save it as a PDF.

User Role: Grantee User	**Menu Option:** Closeout Grant

4 If the Grantee User selects **<Submit>**, DRGR will prompt the User with a warning that edits cannot be made after submission. Selecting **<OK>** confirms submission of the Grant Closeout Request and will take the user to the **"Closeout Submission"** page.



5 The **"Closeout Submission"** page provide the Grantee User with view only information on the Closeout Request.



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C. HUD | Review Closeout Checklist

CPD Representatives can enter checklists, provide comments, and attach relevant documents during the closeout document review. After the CPD Representative review and approval, the checklist is reviewed by the Field Office Manager or Super User for final review and closeout.

C1. HUD | CPD Representative Closeout Checklist Review and Approval

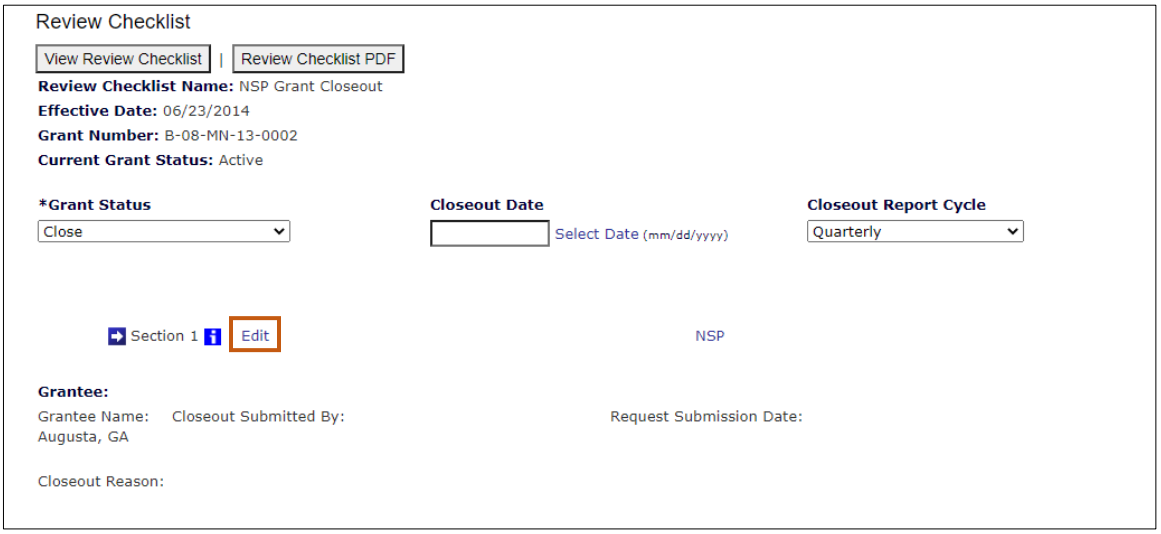
User Role: HUD User	**Menu Option:** Closeout Grant
Purpose: Allow HUD Users to access review checklist	

Complete the following steps to access the "Review Checklist" page:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Review Checklist"** page will load for the "Selected Grant" in the Navigation Bar.

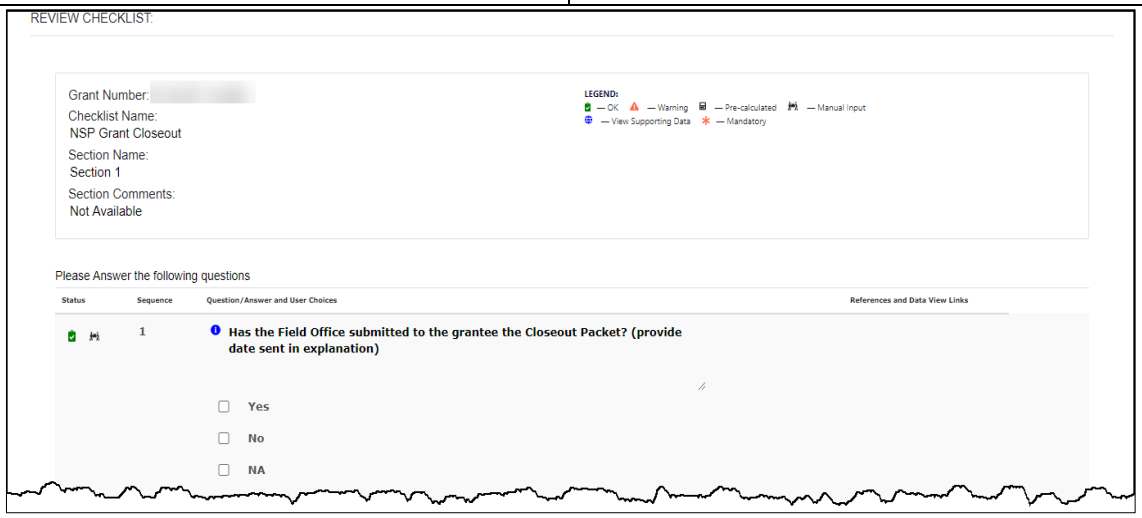
TIP! Only CPD Representatives for the Grant, Field Office Managers, and Super Users have access to the **<Grant Closeout>** link.

2 On the **"Review Checklist"** page, HUD Users select the **<Edit>** link next to any listed review sections.



3 The **"Review Checklist – Section"** page is displayed. CPD Representatives can provide answers and comments to the checklist questions. In cases where there are no sections for editing, questions will not be displayed but the user can still provide comments and attach documents. The legend icons are described in the "Checklist Legend Icon Description" chart at the end of this Chapter. CPD Representatives must complete the **"Review Checklist – Section"** page in accordance with guidelines. Guidelines can be accessed by selecting the URLs associated with the "Section(s)" or each associated question. Checklists are not solely question and answer based and may require user inputs.

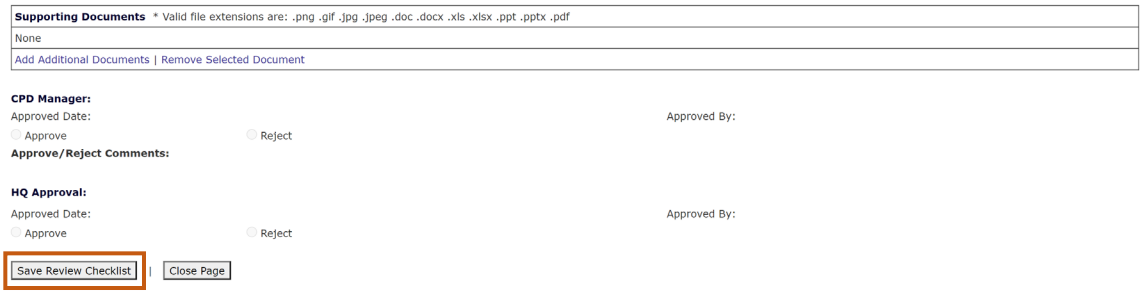
User Role: HUD User	**Menu Option:** Closeout Grant



4 Users select **<Save>** to save the checklist edits. This action returns the user to the **"Review Checklist"** page. Select **<Save Review Checklist>** once all review sections are completed. To submit the checklist for Field Office Manager or Super User approval, select the check box next to "Submit for Approve" before selecting **<Save Review Checklist>.**

TIP! CPD Representatives cannot edit the Review Checklist after they have submitted the Review Checklist, or when the Grant status is changed to "Ready to Close" or "Closed."

User Role: HUD User	**Menu Option:** Closeout Grant



C2. HUD | Field Office Manager or Super User Checklist Review and Approval

Field Office Managers and Super Users can review checklists, provide approver comments, and attach relevant documents. On Field Office Manager's approval of the Review Checklist, the System changes the status of the Grant to "Ready for Closeout" and notifies Super Users via email that the Grant status has been modified. Field Office Managers and Super Users follow the steps below to review and approve checklists.

User Role: HUD User	**Menu Option:** Closeout Grant

Purpose: Allow HUD Users to access review checklist

Complete the following steps to access the "Review Checklist" page:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<Closeout Grant>** link. The **"Review Checklist"** page will load for the "Selected Grant" in the Navigation Bar. Follow steps in Section C1 above to make edits to the checklist, if necessary.

TIP! Only CPD Representatives for the Grant, Field Office Managers, and Super Users have access to the **<Grant Closeout>** link.

2 For Field Office Managers, on the **"Review Checklist"** page, Field Office Managers can provide comments in the "Approve/Reject Comments" narrative section. If the CPD Representative is also the Field Office Manager, then the System allows the User to enter "Review" and "Approve" comments upon initial review. Select the **<Approve>** or **<Reject>** radio button. Selection of **<Approve>** changes the status of the Grant and locks the screen for any further edits. Select **<Save Review Checklist>** to have the System notify Super Users of the need for approval.

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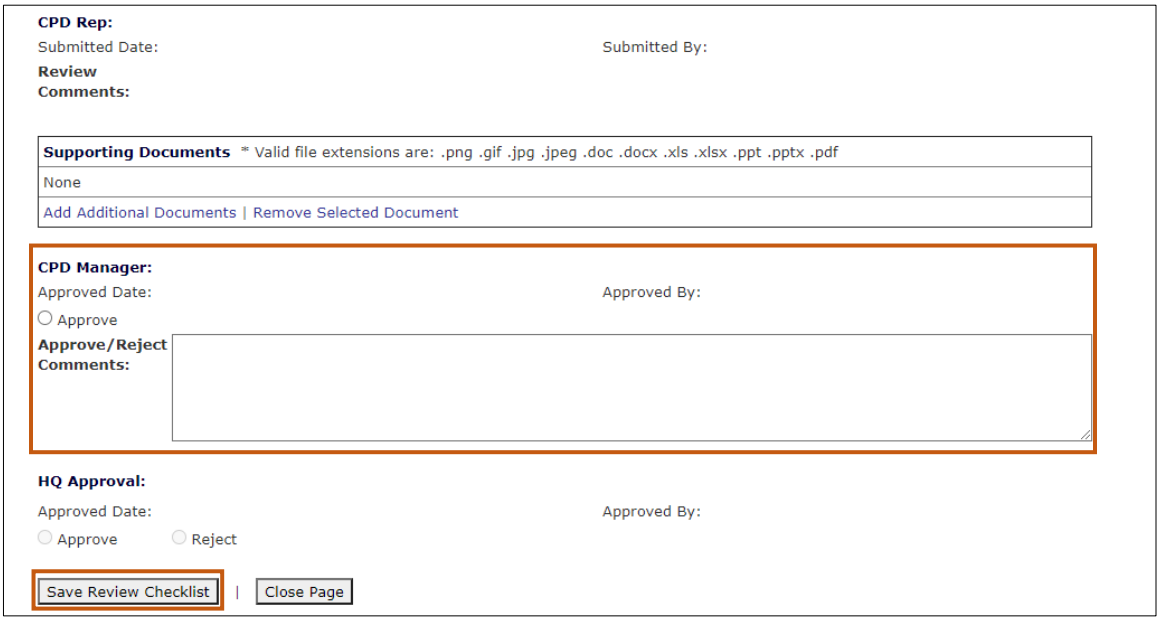
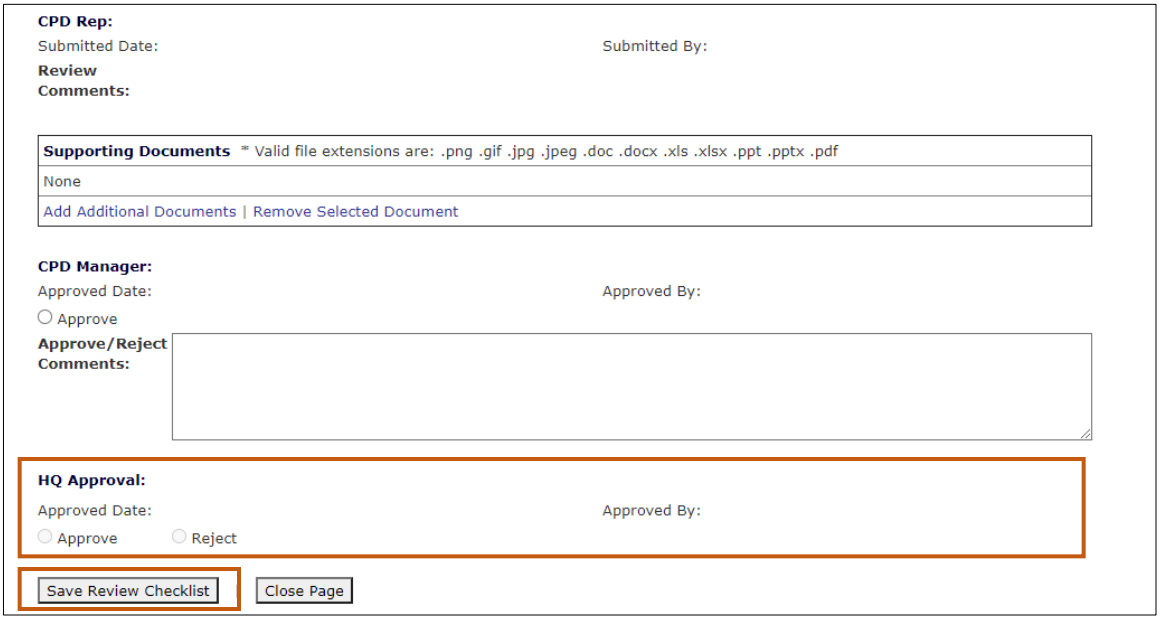
User Role: HUD User	Menu Option: Closeout Grant

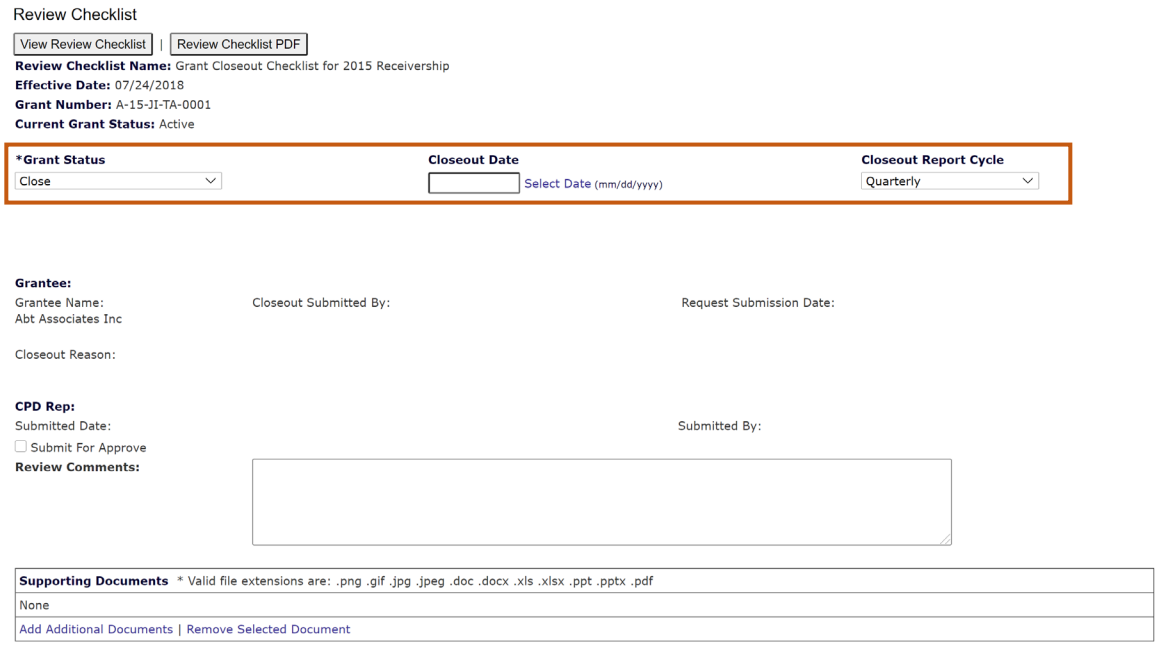


3 For Super Users, on the **"Review Checklist"** page, Super Users can "Approve" or "Reject" the checklist using the **<Approve>** or **<Reject>** radio button. Select **<Save Review Checklist>** to save changes.



User Role: HUD User	**Menu Option:** Closeout Grant

4 Super Users can select the Grant status from the "Grant Status" dropdown, enter a closeout date in the "Closeout Date" field, and select a reporting cycle from the "Closeout Report Cycle" dropdown.



D. Grantee and HUD | View Review Checklist

All users can access a view only screen to review checklists and see complete questions and comments.

User Role: Grantee User and HUD User	**Menu Option:** View Grant

Purpose: Allow Grantee Users and HUD Users to view review checklist

Complete the following steps to view the "Review Checklist" page:

1 Navigate to the **Manage My Grants** module as described in Section A above and locate the **Grants** menu. Select the **<View Grant>** link. The **"View Grant"** page will load for the "Selected Grant" in the Navigation Bar.

2 On the **"View Grant"** page, select the **<View Review Checklist>** link to view the checklist.

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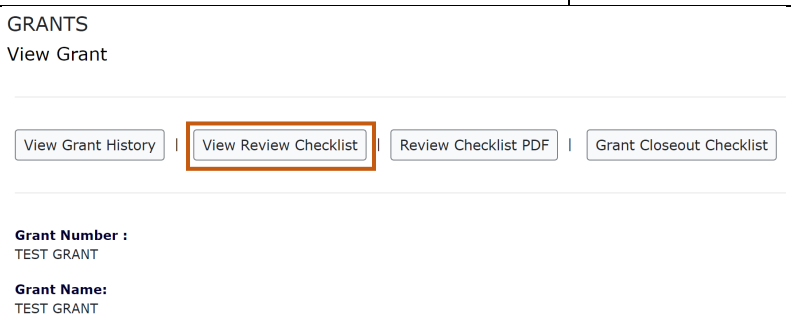
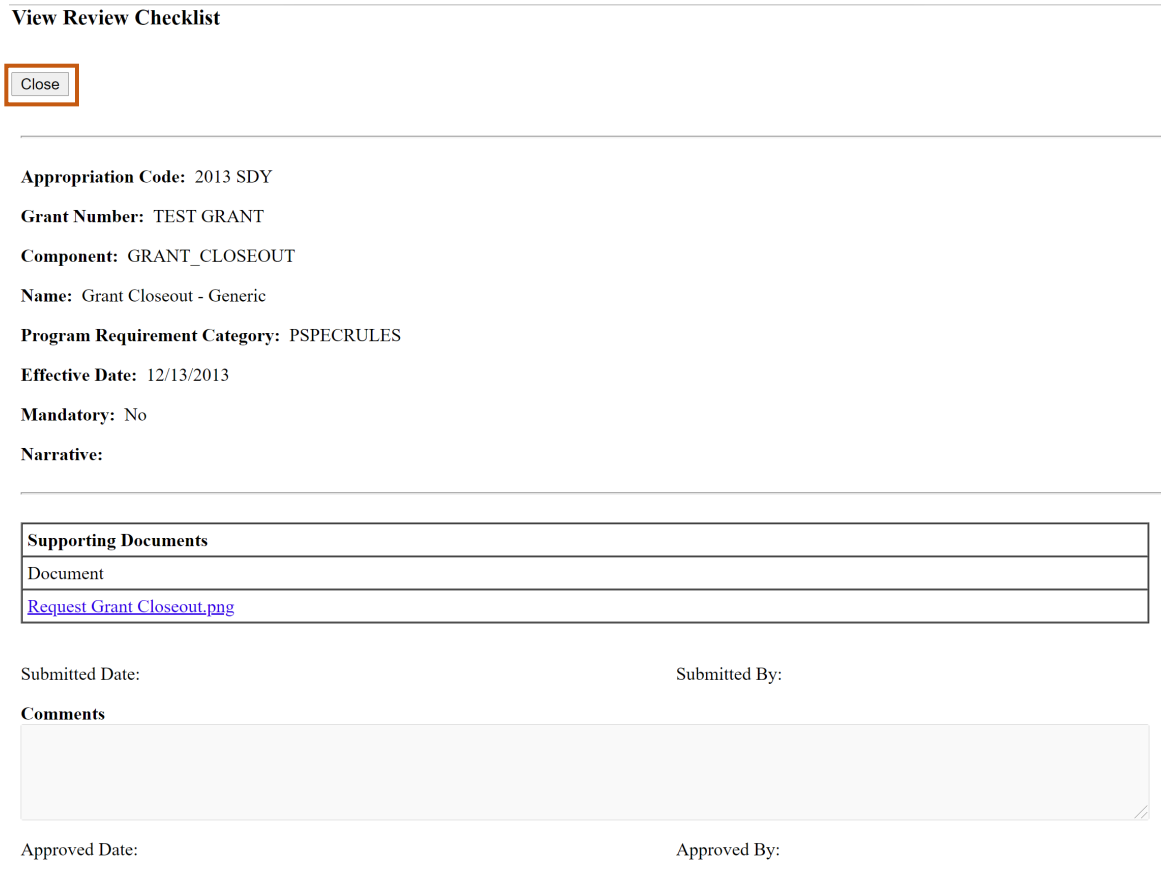
User Role: Grantee User and HUD User	**Menu Option:** View Grant



3 On the **"View Review Checklist"** page, users can see information completed in HUD's review. Select **<Close>** to close the page.



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Checklist Legend Icon Descriptions

* — Mandatory	Mandatory questions are annotated on the **"Edit Checklist"** page with a red asterisk. Review checklists cannot be submitted if the user has not responded to all mandatory questions.
— Warning	Questions that are mandatory and do not have a response will be displayed with a warning icon.
— Pre-calculated	Some question responses may be auto-computed by the System. If a response to a checklist question is auto-computed, then the System displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
— Manual Input	Non-auto-computed question responses are depicted with the Manual Input icon.
— View Supporting Data	Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. On selection of this icon, the System will open a new page to display the supporting data.

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