Chapter 5: User Management and Certifications | Administration Module

Chapter 5: User Management and Certifications

This Chapter provides information for managing DRGR user accounts, including associating users, certifying users, requesting new users, and managing existing users contained in the **Administration** module.

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

Grantee Users

Menu Option	Subsection	Action
Associate Users to Grants	B1	Assign Grantees users to access certain Grants
Certify Grantee Users	C1	Recertify Grantee Users every six months
Request New Users	E1	Request DRGR user accounts for the first time
Manage Existing Users	E2	Modify existing DRGR user accounts
Upload User Requests	--	See Chapter 34: Data Uploads

HUD Users

Menu Option	Subsection(s)	Action(s)
Certify Grantee Admin Users	C2 E5	Recertify Grantee Admin Users every six months Manage User Requests for Grantee Administrators
Certify Grantee Users	C2 E5	Recertify Grantee Users every six months Manage User Requests for Grantee Users
Certify HUD Office Users	C3	Recertify HUD Users every six months
Request New Users	E3	Request DRGR user accounts for the first time
Manage Existing Users	E4	Modify existing DRGR user accounts
Upload User Requests	--	See Chapter 34: Data Uploads

A. Administration Module Access

The **Administration** module contains all user management functions.

A1. Grantee | User Access

User Role: Grantee User	Menu Option: 👑▾ Administration Module

Purpose: Allow Grantee Users to access User Management actions.

✔️   Complete the following steps to access the Administration Module:

1	In the DRGR System, select the **Administration** module, or 👑▾ icon, located in the navigation menu.

2	This opens the dropdown menu items for the **Administration** module. The System displays the relevant menu items based on user type and user roles.

A2. HUD | User Access

User Role: HUD User	Menu Option: 👑▾ Administration Module

Purpose: Allow HUD Users to access User Management actions.

✔️   Complete the following steps to access the Administration Module:

1	In the DRGR System, select the **Administration** module, or 👑▾ icon, located in the navigation menu.

User Role: HUD User	Menu Option: Administration Module

2   This opens the dropdown menu items for the **Administration** module. The System displays the relevant menu items based on user type and user roles.

B. Associate Grantee Users to Grants

This action allows the Grantee administrator to add or remove Grantee users' access to Grants within the Grantee's portfolio. This step is necessary for all Grantee users to work on Action Plans, QPRs, etc. for one or more Grants. *NOTE: **User must have the admin role for this function.**

> TIP! Refer to DRGR Data Analytics Report A44 to view existing Grantee User access to grants.

B1. Grantee | Associate Grantee Users to Grants

User Role: Grantee Administrator	Menu Option: Associate Users to Grants
Purpose: Allow Grantee Users to access one or more Grants.	
✔ Complete the following steps to Associate or De-Associate Users to Grants:	

1   Navigate to the **Administration** module, locate the **User Management** menu, select the **<Associate Users to Grant>** link. See step A1 above. A page will load showing a list of available Grants. In the "Grant Number" column, select the desired **<Grant Number>** to which users will be associated or from which users will be de-associated.

Grant Number		Grant Status
B-08-MN-36-0103		Active
B-09-LN-NY-0007		Active
B-11-MN-36-0103		Active
B-13-MS-36-0001		Active
B-13-MS-36-0002		Active

User Role: Grantee Administrator	Menu Option: 👉 Associate Users to Grants

2   To assign a Grantee User, follow the steps below:

   a.   Choose the user to be assigned by selecting the user's name in the "Available Users" box.

   b.   To assign a name to a Grant, select **<Assign>**. The users name will slide over to the "Authorized Users" box.

   c.   Select **<Save>**. The action is complete, and the user is associated to the Grant and will be able to access functions available to the user's role within the Grant.

   To de-associate a user from a Grant, follow the steps in reverse order by highlighting the name in the "Authorized User" box, selecting the **<Remove>** link so that the name slides to the "Available Users" box, and selecting **<Save>.** The action is complete, and the user is de-associated from the Grant.

3   To unassign a user, select the desired user from the "Authorized Users" dialogue box and select **<Remove>**. Select **<Save>** for changes to take effect.

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C. Certify and Activate Users

In addition to the initial certification, a recertification process occurs every six (6) months (January 1 and July 1), requiring every DRGR user to be recertified by a higher-level user. If a DRGR user's certification expires, they will be unable to login until the recertification process is completed.

Thirty (30) days prior to January 1 and July 1, users will receive a pop-up message every time they login to the DRGR System until their account is recertified. If a user is not recertified within 30 days, their account will become "Inactive," and the user will remain unable to login to the DRGR System. The user's account can easily be reactivated by the Grantee Administrator using the recertification process.

The following figure shows the hierarchy of recertification. The HUD Superuser represents the highest level of recertification. Each user in the figure must be recertified by the user to the left.

Hierarchy of User Certification

C1. Grantee | Certify and Activate Grantee Users

User Role: Grantee Administrator	Menu Option: 👤 Certify Grantee Users

Purpose: Allow Grantee Administrators to Certify Grantee Users. The following shows the hierarchy of user certifications:

☑ Complete the following steps to (Re)certify and/or (In)Activate Grantee Users:

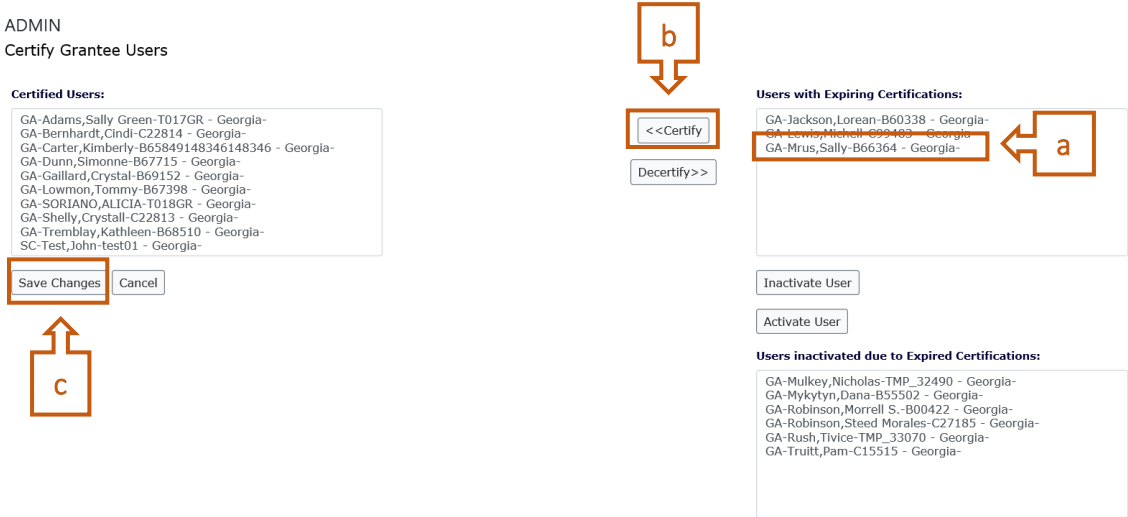| 1	Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify Grantee Users>** link. See step A1 above. The **"Certify Grantee Users"** page will load.
2	To recertify a Grantee User, follow the steps below: a. Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box. b. Select **<Certify>**. The users name will slide over to the "Certified Users" box. c. Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.

User Role: Grantee Administrator	Menu Option: 👤 Certify Grantee Users

ADMIN
Certify Grantee Users

Certified Users:

GA-Adams,Sally Green-T017GR - Georgia-
GA-Bernhardt,Cindi-C22814 - Georgia-
GA-Carter,Kimberly-B65849148346148346 - Georgia-
GA-Dunn,Simonne-B67715 - Georgia-
GA-Gaillard,Crystal-B69152 - Georgia-
GA-Lowmon,Tommy-B67398 - Georgia-
GA-SORIANO,ALICIA-T018GR - Georgia-
GA-Shelly,Crystall-C22813 - Georgia-
GA-Tremblay,Kathleen-B68510 - Georgia-
SC-Test,John-test01 - Georgia-

Save Changes   Cancel

Users with Expiring Certifications:

GA-Jackson,Lorean-B60338 - Georgia-
GA-Lewis,Michell-C59485 - Georgia-
GA-Mrus,Sally-B66364 - Georgia-

<<Certify

Decertify>>

Inactivate User

Activate User

Users inactivated due to Expired Certifications:

GA-Mulkey,Nicholas-TMP_32490 - Georgia-
GA-Mykytyn,Dana-B55502 - Georgia-
GA-Robinson,Morrell S.-B00422 - Georgia-
GA-Robinson,Steed Morales-C27185 - Georgia-
GA-Rush,Tivice-TMP_33070 - Georgia-
GA-Truitt,Pam-C15515 - Georgia-

3	To reactivate a Grantee User or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" box and select **<Activate User>.** The selected user will move to "Users with Expiring Certifications," then follow the steps above in 1 for recertifying expired users.
4	To decertify or deactivate a Grantee User, complete steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.

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C2. HUD | Certify and Activate Grantee Administrators

User Role: CPD Representative	Menu Option: 👤 Certify Grantee Admin Users

Purpose: Allow CPD Representatives to Certify Grantee Administrators. The following shows the hierarchy of user certifications:

☑ **Complete the following steps to (Re)certify and/or (In)Activate Grantee Administrators:**

1   Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify Grantee Admin Users>** link. See step A2 above. The **"Certify Grantee Admin Users"** page will load.

2   To recertify a Grantee User, follow the steps below:

     a.   Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box.

     b.   Select **<Certify>**. The users name will slide over to the "Certified Users" box.

     c.   Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.

3   To reactivate a Grantee Administrator or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" and select **<Activate User>**, the selected user will be relocated to the "Users with Expiring Certifications," box then follow the steps above in Step 1 for recertifying expired users.

User Role: CPD Representative	Menu Option: 👤 Certify Grantee Admin Users
4 To decertify or deactivate a Grantee User, complete Steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.	

C3. HUD | Certify and Activate HUD Office Users

User Role: Field Office Manager	Menu Option: 👤 Certify HUD Office Users

Purpose: Allow Field Office Managers to Certify HUD Office Users (e.g., CPD Representatives). The following shows the hierarchy of user certifications:

☑   Complete the following steps to (Re)certify and/or (In)Activate HUD Office Users:

1   Navigate to the **Administration** module, locate the **User Management** menu, select the **<Certify HUD Office Users>** link. See step A2 above. The **"Certify HUD Office Users"** page will load.

2   To recertify a HUD Officer User, follow the steps below:

   a.   Choose the user to be assigned by selecting the user's name in the "Users with Expiring Certifications" box.

   b.   Select **<Certify>**. The users name will slide over to the "Certified Users" box.

   c.   Select **<Save Changes>**. The action is complete, and the user is recertified and will be able to access functions available to the user's role within the Grant.

3   To reactivate a HUD Office User or perform the initial certification for a new user, select the desired user from the "Users inactivated due to Expired Certifications" box and select **<Activate User>**, the

User Role: Field Office Manager	Menu Option: Certify HUD Office Users
selected user will be relocated to "Users with Expiring Certifications," box then follow the steps above in Step 1 for recertifying expired users.	
4 To decertify or deactivate a HUD Office User, complete Steps 1 or 2 in reverse. Select **<Save Changes>** for changes to take effect.	

D. Summary of User Accounts and Profiles

D1. DRGR User Accounts versus Profiles

Every DRGR user must have a user account and one or more user profiles. In most instances, the terms "User Account" and "User Profile" are used interchangeably since most users have only one user profile associated with their user account.

- A User Account grants access to the DRGR System.

- A User Profile grants access to a portfolio of Grants within in the DRGR System.

- For Grantee Users, the User Profile is associated with a Grantee Profile. For HUD Users, the User Profile is associated with a HUD Field Office.

- User Accounts can have one or more User Profiles, but most User Accounts have only one User Profile since most Grantee staff only work for a single Grantee.

- Each User Profile gives the user certain access, roles, and privileges.

D2. Grantee User Account Management Workflow

Grantee user accounts are managed entirely within the DRGR System:

- Grantee Users and HUD Users with the "User Profile Request" role can request to add a new user or modify an existing user.

- All user requests must be reviewed and approved by the HUD Field Office (either the CPD Representative or Field Office Manager) and the HUD DRGR Administrator.

- Automated status emails will be generated and sent to affected Grantee and HUD users throughout the request and approval process.

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Grantee User Account Workflow
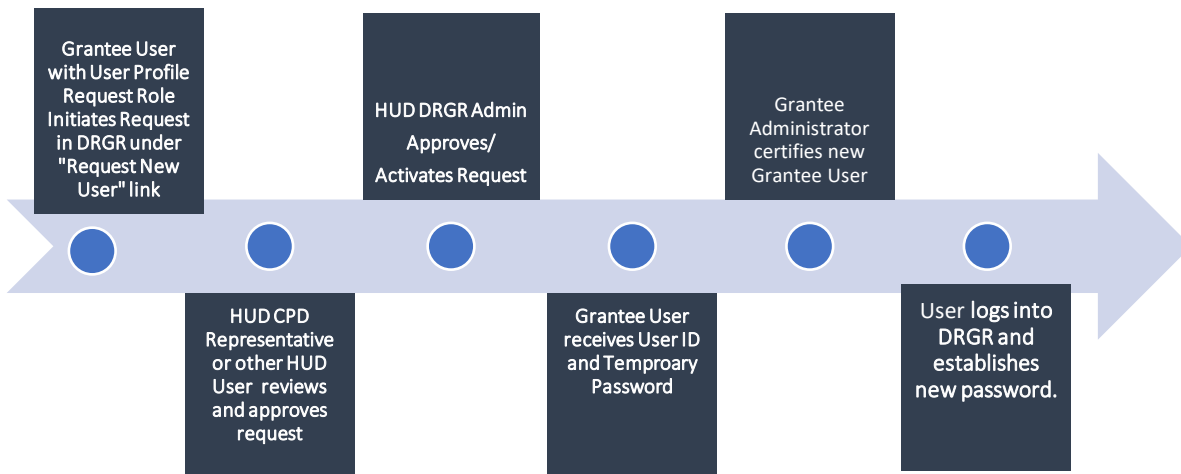
Note: HUD users self-submitted and Grantee Administrator/Regular User update requests go directly to the HUD DRGR Administrator for activation.

D3. HUD User Account Management Workflow

HUD user accounts are processed through DIAMS at https://diams.hud.gov. HUD users should speak with their supervisor to request access to the DRGR System.

D4. Summary of User Roles

User roles grant certain privileges and access to DRGR users. User roles are managed at the User Profile Level. The following depicts the user roles available to Grantee and HUD users and a brief description of each.

TIP! Refer to DRGR Data Analytics Report A44 to view existing User Roles.

Grantee and HUD User Roles

HUD Profile:

HUD Office	HUD Program	View Only	HQ Admin	Super User	Approve Drawdown	User Profile Request	Update FAQ	Office of Inspector General	Active	
▼		☐	☐	☐	☐	☐	☐	☐	☐	

Add HUD Profile

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active	
▼		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	

Add Grantee Profile

Role	User Profile Type	Description
Grantee Admin	Grantee	Enables associate and recertify Grantee users
User Profile Request	Grantee and HUD	Enables user management
Request Drawdown	Grantee	Enables manage obligation and create voucher
Approve Drawdown	Grantee and HUD	Enables manage obligation and approve voucher
Submit Voucher Doc to HUD	Grantee	Enables submit voucher line item documents
Submit Action Plan	Grantee	Enables submit action plan or submit TA work plans
Submit Performance Reports	Grantee	Enables submit QPR
Staff Rate	Grantee	Enables submission of staff rates and associate TA staff to rates; enables view of rates on work plans
Manage TA Assignments	HUD	Enables create and issue TA assignments
Contractor	Grantee	Not in use and not covered in this manual
View Only	Grantee and HUD	Enables view only (no edit) privileges
Update FAQ	Grantee and HUD	Enables ability to edit FAQs
HQ Admin	HUD	Enables HQ user management
Super User	HUD	Enables Superuser privileges
Office of Inspector General	HUD	Enables unique view only (no edit) privileges

The remainder of this page is intentionally left blank.

Grantee User Roles and Privileges

This chart shows the functions associated with each user role. It is a helpful guide to determined what user roles may be needed for an individual's job functions.

Module	Function/Capability	Grantee Admin	Grantee User	Grantee View Only	Request Drawdown	Approve Drawdown	Voucher Documents	Request User Account	Submit QPR	Submit Action Plan	Submit TA Work Plan	TA Staff Rate View
		Basic Roles			**Additional Roles**							
Administration	Certify Grantee Users	X										
	Assign Users to Grant	X										
	Add/Edit/Deactivate Users							X				
	View Responsible Orgnizations	X	X	X								
	Add/Edit Responsible Organizations	X	X									
	View/Submit TA Staff Rates											X
	Associate TA Staff to Rates											X
Grant Management: Action Plan	View Action Plans	X	X	X								
	Add/Edit Action Plans	X	X									
	Submit Action Plans									X	X	
	View Action Plan Review Tools	X	X	X								
	View/Edit Rates on TA Workplans	X	X	X								
	View TA Workplans	X	X	X								
	View TA Workplans	X	X	X							X	
Grant Management: QPR	View QPRs	X	X	X								
	Edit QPRs	X	X									
	Submit QPRs								X			
	View QPR Review Tools	X	X	X								
Financial	View Obligations	X	X	X								
	Update Obligations				X	X						
	View Drawdowns	X	X	X								
	Create/Revise Drawdowns				X							
	Approve Drawdowns					X						
	Submit Voucher Documents						X					
	View Receipts	X	X	X								
	Create/Edit Receipts				X	X						
	View PI Accounts	X	X	X								
	Create/Edit PI Accounts				X	X						
	Block Project Drawdowns				X	X						
	Block Activity Drawdowns				X	X						
	Edit Rates on TA Invoices											X
	View TA Invoices	X	X	X								
	Submit TA Invoices				X	X						
Compliance	View Flags	X	X	X								
	Manage Flags	X	X									
	View Monitoring/TA Events	X	X	X								
	Add/Edit Monitoring/TA Events	X	X									
Reports	View MicroStrategy Reports	X	X	X								

NOTE: Grantees must have at least two DRGR Users with "Drawdown Roles": one to create the voucher, and another to approve the voucher.

HUD User Roles and Privileges

Module	Function/Capability	Basic Roles					Additional Roles							
		Superuser	HQ Admin	HUD User	HQ View Only	HQ OIG User	Draw Threshold Review	Drawdown Approver	Voucher Documents	Request User Account	Add/Edit FAQ	HUD FO Manager	CPD Representative	Staff Rate Approver
Administration	Certify HUD FO Managers	X												
	Add HUD FO Managers and Users	X												
	Certify HUD Field Office Users	X										X		
	Certify Grantee Administrators	X											X	
	Add/Edit/Deactivate Users	X	X							X		X	X	
	Manage Appropriations	X												
	View Appropriations	X			X	X								
	Manage Grants/Grantees	X												
	View Grants/Grantees	X			X	X								
	Add/Edit FAQs	X									X			
	View TA Staff Rates	X				X								
	Approve TA Staff Rates	X												X
	Associate TA Staff to Rates	X												X
Grant Management: Action Plan	View Action Plans	X		X	X	X								
	Review Action Plans	X										X	X	
	View Action Plan Review Tools	X		X	X	X								
	View/Add Rates on TA Workplans	X												X
	View TA Workplans	X		X	X	X								
	Approve TA Workplans	X										X	X	
Grant Management: QPR	View QPR	X		X	X	X								
	Review QPR	X										X	X	
	View QPR Review Tools	X		X	X	X								
Financial	View Obligations	X		X	X	X								
	View Drawdowns	X		X	X	X								
	Approve Vouchers over Threshold	X					X	X						
	Manage Voucher Documents	X							X					
	View Receipts	X		X	X	X								
	View Program Income Accounts	X		X	X	X								
	Block Grant Obligations	X												
	Block Grant Drawdowns	X												
	Block Project Drawdowns	X												
	Block Activity Drawdowns	X												
	View Rates on TA Invoices	X		X		X								
	View TA Invoices	X		X		X								
Compliance	View Flags	X		X	X	X								
	View Monitoring/TA Events	X		X	X	X								
Reports		X	X	X	X	X								

E. Managing Grantee User Accounts

E1. Grantee | Request New User

User Role: Grantee User Profile Request	Menu Option: 👤+ Request New Users
Purpose: Allow Grantee Users with the User Profile Request role to Request New Grantee Users.	

☑ Complete the following steps to request a new user be added to the DRGR System:

1	Navigate to the **Administration** module, locate the **User Management** menu, select the **<Request New User>** link. See step A1 above. The **"Request New User"** page will load.
2	On the **"Request New User"** page, respond to the question "Does staff already have a HUD username in IDIS/DRGR" and then enter search criteria.
	Use the **<Search>** button to determine if the new user has existing User ID in IDIS or DRGR.

ADMIN
Register New User

Does staff already have a HUD username in IDIS/DRGR: (e.g. C, B, H)
◉ IDIS ○ DRGR ○ No/Unknown/Unable to find

Please search for and select staff user below:
Search Criteria

Username:

Name:

HUD Office:

State/Territory:

[Search] [Reset]

[Continue to Next Page]

> *** NOTE: Be sure to search both IDIS and DRGR before selecting the No/ Unknown/ Unable to find" option.**

3	To select an existing user in IDIS or DRGR, select the radio button next to the user and select **<Continue to Next Page>**.

Manage Existing Users
* Does staff already have a HUD username in IDIS/DRGR? (e.g. C*****, B******, H*****)
○ IDIS ◉ DRGR ○ No/Unknown/Unable to find

Search Criteria

Username:

Name:
doolittle

HUD Office:

State/Territory:

Grantee Name:

[Search] [Reset]

2 Record(s) Displaying 1 through 2

Select	Username	Name	Status	HUD Office	Grantee Name
○	T038GR	Janelle Doolittle	Active		Rural Community Assistance Corporation
○	T038GR	Janelle Doolittle	Active		RCB-Rural Community Assistance Corp

[Request Edit] | [Request Deactivation] | [Manage Subscriptions]

User Role: Grantee User Profile Request	Menu Option: 👤+ Request New Users

If the search results include no data, select either the "No/Unknown/Unable to find" radio button or select **<Continue to Next Page>**.

- Unable to search for IDIS users at this time. Please try again later or select 'No/Unknown/Unable to find' to proceed.

* Does staff already have a HUD username in IDIS/DRGR? (e.g. C*****, B******, H*****)
◉ IDIS ◯ DRGR ◯ No/Unknown/Unable to find

Please search for and select staff user below:
Search Criteria

Username:	Name:
	doolittle

HUD Office:	State/Territory:	Grantee Name:

[Search] [Reset]

[Continue to Next Page]

---

4   On the "**Request New User**" page, complete the following steps to populate information on new users:

     a.   Enter required fields labeled with an (*) asterisk, if not populated. If the new request is for a person who has an account in IDIS or DRGR, information is populated.

     b.   Select the desired user roles.

     c.   Select **<Submit>**.

ADMIN
Request New User

[Submit] | [Cancel]   ⟵ c   a ⬇

*Indicates Required Field

*First Name:		Title:
*Last Name:		Organization:
*Email:		Phone Number: Ext:
Address 1:		Fax:
Address 2:		*PIN (five digits used in initial password):
Address 3:		*PIN (re-enter):
*City:		
* State: * Zip Code:		

*Select Grantee User Profile

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active
Georgia		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

[Add Grantee Profile]   ⟵ b

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5   The DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users.

E2. Grantee | Manage Existing User

User Role: Grantee User Profile Request	Menu Option: 👥 Manage Existing Users

Purpose: Allow Grantee Users with the User Profile Request role to edit/deactivate existing user profiles.

☑ Complete the following steps to edit or deactivate existing User Profiles:

1	Navigate to the **Administration** module, locate the **User Management** menu, select the **<Manage Existing Users>** link. See step A1 above. The **"Manage Existing Users"** page will load.

2	To modify information for existing users, follow the steps below: a. Enter search criteria. b. Select **<Search>**. c. Search results will return. Select user using the radio buttons under the Select column. d. Choose to the **<Request Deactivation>** or **<Request Edit>** options.

3	If requesting deactivation, select the radio button next to the desired user (see Step 1c) and select **<Request Deactivation>** (see Step 1d). The following page will load. Select **<Submit Deactivation Request>** to complete the process.

User Role: Grantee User Profile Request	Menu Option: 👥 Manage Existing Users

ADMIN
Request User Deactivation

Submit Deactivation Request | Cancel

First Name:
Aaron

Last Name:
Moser

Email:
sunil.rekhi@hud.gov

Username:
C91252

| 4 | If requesting an edit to an existing user profile, select the radio button next to the desired user (see Step 1c) and select **<Request Edit>** (see Step 1d)**.** The following page will load. Complete the desired edits select **<Submit>**.

ADMIN
Request User Edits

Submit \| Cancel

*Indicates Required Field

*First Name: "Bill" F. W — User Name: B00760
*Last Name: Mandeville — Title:
*Email: sunil.rekhi@hud.gov — Organization:
Address 1: — Phone Number: Ext:
Address 2: — Fax:
Address 3:
*City:
* State: WA — *** Zip Code:**

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

Grantee Profile:

| Grantee | Agency | View Only | Grantee Admin | Request Drawdown | Approve Drawdown | Submit Action Plan | Submit Performance Reports | Staff Rate | Contractor | User Profile Request | Update FAQ | Submit Voucher Docs to HUD | Active |
\|---\|---\|---\|---\|---\|---\|---\|---\|---\|---\|---\|---\|---\|---\|
\| Washington \| 101699 \| ☐ \| ☑ \| ☑ \| ☐ \| ☑ \| ☑ \| ☑ \| ☐ \| ☑ \| ☐ \| ☐ \| ☑ \|

Add Grantee Profile |

| 5 | After completing Step 2 or 3, the DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users. |

E3. HUD | Request New User

User Role: HUD User Profile Request	Menu Option: Request New Users

Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to Request New Grantee Users.

☑	**Complete the following steps to request a new user be added to the DRGR System:**

1	Navigate to the **Administration** module, locate the **User Management** menu, select the **<Request New User>** link. See step A2 above. The **"Request New User"** page will load.
2	On the **"Request New User"** page, respond to the question "Does staff already have a HUD username in IDIS/DRGR" and then enter search criteria. Use the **<Search>** button to determine if the new user has existing User ID in IDIS or DRGR. Be sure to search both IDIS and DRGR before selecting the "No/Unknown/Unable to find" option.
3	To select an existing user in IDIS or DRGR, select the radio button next to the user and select **<Continue to Next Page>**. If the search results include no data, select either the "No/Unknown/Unable to find" radio button or select **<Continue to Next Page>**.

User Role: HUD User Profile Request	Menu Option: ➕ Request New Users

> • Unable to search for IDIS users at this time. Please try again later or select 'No/Unknown/Unable to find' to proceed.
>
> *** Does staff already have a HUD username in IDIS/DRGR? (e.g. C*****, B******, H*****)**
> ⦿ IDIS ◯ DRGR ◯ No/Unknown/Unable to find
>
> **Please search for and select staff user below:**
> Search Criteria
>
> **Username:**   **Name:**
> [   ]   [doolittle]
>
> **HUD Office:**   **State/Territory:**   **Grantee Name:**
> [▼]   [▼]   [   ]
>
> [Search] [Reset]
>
> [Continue to Next Page]

4	On the "**Request New User**" page, complete the following steps to populate information on new users:
	a. Enter required fields labeled with an (*) asterisk, if not populated. If the new request is for a person who has an account in IDIS or DRGR, information is populated.
	b. Select the desired user roles.
	c. Select **<Submit>**.

> ADMIN
> Request New User
>
> [Submit] [Cancel]   **c**   **a**
>
> *Indicates Required Field
>
> ***First Name:**   **Title:**
> [   ]   [   ]
>
> ***Last Name:**   **Organization:**
> [   ]   [   ]
>
> ***Email:**   **Phone Number:** **Ext:**
> [   ]   [   ] [   ]
>
> **Address 1:**   **Fax:**
> [   ]   [   ]
>
> **Address 2:**   ***PIN (five digits used in initial password):**
> [   ]   [   ]
>
> **Address 3:**   ***PIN (re-enter):**
> [   ]   [   ]
>
> ***City:**
> [   ]
>
> *** State:**   *** Zip Code:**
> [▼]   [   ] -
>   [   ]
>
> ***Select Grantee User Profile**
>
> **Grantee Profile:**

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active
Georgia ▼		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

> [Add Grantee Profile]   **b**

5	The DRGR System will send the request to the appropriate HUD Users for review and an automated email to the affected Grantee and HUD users.

E4. HUD | Manage Existing User

User Role: HUD User Profile Request	Menu Option: 👥 Manage Existing Users
Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to edit/deactivate existing user profiles.	

☑ Complete the following steps to edit or deactivate existing User Profiles:
1   Navigate to the **Administration** module, locate the **User Management** menu, select the **<Manage Existing Users>** link. See step A2 above. The **"Manage New Users"** page will load.

2   To modify information for existing users, follow the steps below:
 	
     e.   Enter search criteria.
 	
     f.   Select **<Search>**.
 	
     g.   Search results will return. Select user using the radio buttons under the "Select" column.
 	
     h.   Choose to the **<Request Deactivation>** or **<Request Edit>** options.

3   If requesting deactivation, select the radio button next to the desired user (see Step1c) and select **<Request Deactivation>** (see Step 1d). The following page will load. Select **<Submit Deactivation Request>** to complete the process.

User Role: HUD User Profile Request	Menu Option: 👥 Manage Existing Users
ADMIN Request User Deactivation [Submit Deactivation Request] [Cancel] **First Name:** Aaron **Last Name:** Moser **Email:** sunil.rekhi@hud.gov **Username:** C91252	

| 4 | If requesting an edit to an existing user profile, select the radio button next to the desired user (see Step 1c) and select **<Request Edit>** (see Step 1d). The following page will load. Complete the desired edits and select **<Submit>**.

ADMIN
Request User Edits

[Submit] [Cancel]

*Indicates Required Field

*First Name: "Bill" F. W   **User Name:** B00760
*Last Name: Mandeville   **Title:**
*Email: sunil.rekhi@hud.gov   **Organization:**
Address 1:   **Phone Number: Ext:**
Address 2:   **Fax:**
Address 3:
*City:
* State: WA   *** Zip Code:**

*Select Grantee User Profile
NOTE: You can edit existing profile or if authorized then you can add only one new profile. If you add new profile then changes to selected existing profile will be ignored.

Grantee Profile:

Grantee	Agency	View Only	Grantee Admin	Request Drawdown	Approve Drawdown	Submit Action Plan	Submit Performance Reports	Staff Rate	Contractor	User Profile Request	Update FAQ	Submit Voucher Docs to HUD	Active
Washington	101699	☐	☑	☑	☐	☑	☑	☑	☐	☑	☐	☐	☑

[Add Grantee Profile] |

| 5 | After completing Step 2 or 3, the DRGR System will send the request directly to the HUD DRGR Admin for final approval/activation. |

E5. HUD | Approve User Request

User Role: HUD User Profile Request	Menu Option: Certify Grantee Users
	Certify Grantee Admin Users

Purpose: Allow HUD Users (e.g., CPD Representatives) with the User Profile Request role to review and approve or reject Grantee user profile requests. Note: There is a different page for approving user requests for Grantee Users versus Grantee Administrators.

☑	Complete the following steps to review and approve or reject user profile requests:

1	Select **<Certify Grantee Users>** or **<Certify Grantee Admin Users>** from the **Administration** 👑▾ menu on the Navigation Bar to load the correct page and review the user profile request (See Section A2, Step 2). The ability to review and approve/reject new user requests (Step 2), edits to existing user profiles (Step 3), or deactivation of existing user profiles (Step 4) appear at the bottom of either page.
2	To view, approve, or reject a new user request, select the desired user profile and then select **<Approve New User>**, **<View Requested User>**, or **<Reject New User>**.
3	To view, approve, or reject an edit user request, select the desired user profile and then select **<Approve Request Change>**, **<View Requested User>**, or **<Reject Request Change>**.

User Role: HUD User Profile Request	Menu Option: Certify Grantee Users Certify Grantee Admin Users
4 To view, approve, or reject a user deactivation, select the desired user profile and then select **<Deactivate User>**, **<View Requested User>**, or **<Reject Deactivate>**. 	
5 After completing Step 2, 3, or 4, the DRGR System will send the request to the HUD DRGR Administrator for review and an automated email to the affected Grantee and HUD users.	

E6. HUD | HQ User Request Approvals

The final step is for the HUD DRGR Administrator to approve the user profile request. Once approved, the DRGR System will send an automated email to affected Grantee and HUD users to notify the process is complete.

The remainder of this page is intentionally left blank.