

Chapte	er 9: Technical Assistance Requests and Assignments	2
Α.	Manage Requests and Assignments Access	3
	A1. Grantee User Access	3
	A2. HUD User Access	3
В.	Manage TA Requests	4
	B1. Grantee and HUD Search for TA Requests	4
	B2. Grantee and HUD View TA Requests	6
	B3. HUD Edit Request Status	8
	B4. HUD Associate Existing Assignment to Request	9
	B5. HUD Disassociate a TA Request from a TA Assignment	12
	B6. HUD Create Assignment from Request	13
	B7. HUD Add Supporting Documents to Request	14
C.	Manage Assignments	16
	C1. HUD Create TA Assignments	16
	C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments	16 21
	C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments	16 21 23
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment 	16 21 23 24
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment C5. HUD Notify TA Providers of an Assignment 	16 21 23 24 25
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment C5. HUD Notify TA Providers of an Assignment C6. HUD Modify TA Assignment Status 	
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment C5. HUD Notify TA Providers of an Assignment C6. HUD Modify TA Assignment Status C7. HUD Edit TA Assignment Details 	
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment C5. HUD Notify TA Providers of an Assignment C6. HUD Modify TA Assignment Status C7. HUD Edit TA Assignment Details C8. HUD Associate TA Requests with an Assignment 	
	 C1. HUD Create TA Assignments C2. Grantee and HUD Search for TA Assignments C3. Grantee and HUD View TA Assignments C4. HUD Delete TA Assignment C5. HUD Notify TA Providers of an Assignment C6. HUD Modify TA Assignment Status C7. HUD Edit TA Assignment Details C8. HUD Associate TA Requests with an Assignment C9. HUD Disassociate a TA Assignment from a TA Request 	
	 C1. HUD Create TA Assignments	
	 C1. HUD Create TA Assignments	



Chapter 9: Technical Assistance Requests and Assignments

HUD uses DRGR to manage technical assistance requests and assignments with technical assistance provider organizations. This Chapter describes actions for Grantee Users associated with technical assistance provider organizations (TA Providers) and HUD users to view, add, and edit Technical Assistance Requests and Assignments, as applicable. These features are accessed under the Work Plans submenu of the **Manage My Grants** module. The following actions are covered in this Chapter as noted below:

Menu Option	Subsection	Action
Q Manage Requests	B1 — B2	Search for and view TA Requests.
Q Manage Assignments	C2	Search for and view TA Assignments.
● Add Work Plan		See Chapter 17: Technical Assistance Work Plans
Q Manage Work Plans		See Chapter 17: Technical Assistance Work Plans
♣ Upload Work Plan		See Chapter 34: Data Uploads

TA Provider Users

HUD Users

Menu Option	Section	Action
▲ Upload Requests		See Chapter 34: Data Uploads
Q Manage Requests	B1 – B3	Search for, view, and edit TA Requests.
Add Assignment	C1	Add TA Assignments.
Q Manage Assignments	C2 – C4	Search for, view, edit, and delete TA Assignments.
Q Manage Work Plans		See Chapter 17: Technical Assistance Work Plans and Chapter 18: Technical Assistance Work Plan - HUD Review



A. Manage Requests and Assignments Access

The Manage My Grants module contains access to TA Request actions.

A1. Grantee | User Access

User Role: Grantee User		Menu Option:	Menu Option: 🏦 Manage My Grants Module					
Purpose: Allow Grantee U	Purpose: Allow Grantee Users associated with TA Providers to access TA Requests actions.							
Complete the follow	Complete the following steps to access the Manage My Grants Module:							
1 Select the Manage M	y Grants module, or	$\widehat{f m}$ icon, located in the na	avigation menu.					
		Y-19-TA-NY-0019		• 🕁 • 💄 • T062GA T062GA [[[062GA]				
2 This opens the dropd The System displays t	own menu for the M he relevant menu ite	anage My Grants module ms based on user type ar	. Navigate to the Wor nd user roles.	∙ k Plans menu.				
Manage My Grants ACTION PLANS ACTION PLANS C Manage Action Plan C Manage Action Pla	OJECTS GRANTEE F View Projects/Activities Add Gr Download Projects/Activities Q Search Search Projects G	ROGRAMS antee Program Grantee Programs Grantee Programs Manage Addresses	GRANTS GRANTS ort ■ Closeout Grant Q Search Grants ⊕ Q t	ORK PLANS Manage Requests Manage Assignments Add Work Plan Manage Work Plans Upload Work Plan				

A2. HUD | User Access

Use	er Role: HUD User	Menu Option:	🏦 Manage My Grants Module					
Pui	Purpose: Allow HUD Users to access TA Requests actions.							
V	Complete the following steps to access the Manag	e My Grants Moo	dule:					
1	In the DRGR System, select the Manage My Grants mo	odule, or 🏦 icon	n, located in the navigation menu.					
	▲ ※ 査・ ◆・ ★・ ▲・ 106/26A TO6/36A							
2	This opens the dropdown menu items for the Manage menu. The System displays the relevant menu items b	• My Grants modu based on user typ	ule. Navigate to the Work Plans e and user roles.					



er Role: HUD User				JD User Menu Option: 🏦 Manage My Gran			
porting System				a	脅 査- \$- 亞- ●	\$- <u>₩</u> - ≜ -	
🟛 Manage My Gra	nts						
ACTION PLANS	PROJECTS	ACTIVITIES	GRANTEE PROGRAMS	PERFORMANCE REPORTS	GRANTS	WORK PLANS	
Manage Action Plan	Add Project	Q Search Activities	Q Search Grantee Programs	Manage Performance Report	Add Grant	1. Upload Requests	
 View Action Plan 	 View Projects/Activities 	🗑 Restore Activities		Q Search Performance Reports [®]	🕼 Manage Grant	Q. Manage Requests	
🛓 Download Action Plan	🛓 Download Projects/Activities				Closeout Grant	Add Assignment	
Q Search Action Plans	Q Search Projects 🕀				 View Grant 	Q, Manage Assignments	
🔀 Review Tools					Q Search Grants	Q Manage Work Plans	
O Looker Constituted Disc.							

B. Manage TA Requests

B1. Grantee and HUD | Search for TA Requests

The system allows Grantee Users associated with TA Providers and HUD Users to search for TA Requests.

User Role: Grantee and HUD Users			Menu Option: Q Manage Requests						
Pur	pose: Allow Gr	antee and HUD Users to search	and view existing Rec	quests.					
	Complete t	he following steps to search exi	isting Requests:						
1	To search for a TA Request, navigate to the Manage My Grants module and locate the Work Plans menu. Select the <manage requests=""></manage> link. The "Manage Requests" page will load.								
2	On the "Manage Requests" page, enter search criteria to access the desired Request. See "Manage Requests Search Fields" table below for description of search fields. After desired fields are populated, choose <search< b="">>. Search results will load. Manage Requests</search<>								
	Search Criteria	Frater III ID Desweet ID	Status	Collect Ope	Show Less Criteria				
	Field Office:	Select Option	 Topic: 	Select One	¥				
	Subject:	Enter Keyword	TA Recipient:	Enter Recipient					
	Last Modified By:	Enter Name	Recipient Organization Type:	Select One	~				
	TA Provider:	Select One	✓ Appropriation:	Select One	~				
			Reset Search						
3	In the Search < Search > or •	results, the user can sort the re < Reset > to restart the search.	esults by selecting the	e search results table	headers. Select				



• Role: Grantee and HUD Users				Menu Option: Q Manage Requests						
CPD Disaster Re	covery Grant Reporting System			Z-21-TA	-VA-0011	≜ ∧	血·\$- 亞- €	· <u>w</u> - 1 -	T019GALast, T019GAFirst [T019GA]	
Manage	Requests									
Search Crite	ria 🗸								Show Less Criteria	
Request ID:	Enter HUD Request ID			Status:	Select One				~	
Field Office:	Select Option		~	Topic:	Select One				~	
Subject:	Enter Keyword			Organization Assisted	Enter Organ	ization				
Last Approved By	Enter Name			Organization Type:	Select One				~	
Organization Stat	e: Select Option		~	TA Provider:	Select One				~	
Approved Date Fr	om: mm/dd/yyyy		=	Approved Date To:	mm/dd/yyyy				=	
			Reset	Search						
Search Result Copy Print Request ID	IS (4520) CSV Ecol Subject	TA Provider Organiza	ion Assisted	Field Office	Request Submitted On	Last Approved On	Last Approved By	Status	Actions	
998	Assistance with reviewing CoC governance models and determining what, if any, changes should be made to our existing CoC governance	FL-507 - O Osceola, Se	lando/Orange, minole Counties CoC	Jacksonville Field Office	08/27/2014	09/08/2014	Kevin Kissinger	Approved	Ø	
997	Request for continuation/extension of HUD TA Assistance	Lorain, OH		Columbus Field Office	08/27/2014	11/05/2014	Lauren Deigh	Approved	ø	
993	Request for TA for TBRA subsidy calculation and monitoring	Columbus,	он	Columbus Field Office	08/26/2014	10/03/2014	Lauren Delgh	Approved	C	
985	NSP DRGR TA request on behalf of Lancaster, CA follow up to NSP readiness review check	Lancaster,	CA	Los Angeles Field Office	08/21/2014	08/21/2014	Paul Patterson	Approved	ß	

Manage Requests Search Fields

Field	Guidance
Request ID	Unique ID defined by TA portal
Status	Drop down menu includes: Approved, Assigned, Cancelled, Closed, In Progress, On Hold
Field Office	Drop down with Field Offices user has access to
Торіс	Drop down with list of topics
Subject	Subject entered by requester
Organization Assisted	Organization assisted for the request
Last Approved By	Last Approved By user's name
Organization Type	Type of Organization
Organization State	State of Organization
TA Provider	Drop down with list of TA Providers
Approved Date From	Date of Approval From (to search using approval date range)
Approved Date To	Date of Approval To (to search using approval date range)



B2. Grantee and HUD | View TA Requests

The system allows authorized users to view TA Requests.

Use	r Role: Grantee and HUD Users	Me	Menu Option: Q Manage Requests						
Pur	pose: Allow Grantee and HUD Users to se	earch and	d view existi	ng Reque	ests.				
	Complete the following steps to searc	h existin	g Requests:						
1	Follow the steps in Section B1 to search	for a Te	chnical Assi	stance Re	equest.				
2	In the "Search Results" section of the "N view or edit the desired Request. Search Results SO CORY PRE COV BEE	√anage I	Requests" p	age, sele	ct the icor	in the "	'Action"	colum	nn to
1	Request ID Subject	TA Provider Ori	ganization Assisted	Field Office	Request Submitted On	Last Approved On	Last Approved By	Status	Actions
								Approved	œ
1								Approved	CC CC
								Approved	ß
								Approved	ß
								Approved	ø
						_		Approved	ß
								Approved	ø
								Approved	18
								Approved	-
		M.C., AD		Loss M				Approved	
3	On the "Manage Request" page, users of Approved TA Type, Requestor, Approve addition, tabs across the page provide a Manage Request HUD Request ID: Requestor: Jane Doe 10(2020	can view r, Reque additiona	the followir st Submissio I informatic Approved TA Ty Approver:	ng inform on Date, , on for Det pe:	ation in th Approve D ails, Recip	ie heade late, Sta lients, ar	er: HUD F tus, and nd Assign	Reque Subje nment	st ID, ct. In cs.
	Request Submission Date: 12/21/2020 Status: Status: Approved		Approve Date: Subject:			Assignmer	12/25/2022		
	Decars		weipiens			Assignmen			
4	The following information is available of Topics, Problem Details, Decision Summ	n the Det hary	tails tab: Re	questor [Details, Po	int of Cc	ontact, R	eques	it



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

User R	ole: Grantee and HUD Us	ers	Menu Option:	Q Manage Requ	ests	
	Details		Recipients		Assignments	
	Additional Details					
	Requestor Details	Name: Organization: Email: Phone:		Jane Doe ABC Associates requestort @abc.com 240-240-2400		
	Point of Contact	Name: Organization: Organization Type: Email: Phone:				
	Request Topics	ONAP: Indian Housing Block Grant				
	Problem Details	housing authority would like to review cu	rrent policies and procedures and revise and	d strengthen them if possible to assure nahasda	compliance.	
	Decision Summary	Decision Summary - 1				
5 TI Bi	he following information ackground and Organizat	is available on the	e Recipients (Or	ganizations Assist	ed) tab: Organization	
	Details		Recipients		Assignments	
	Organizations Assisted					
	Organization Background	Consulted the local field office?			⊕ View Comments	
	Organizations Assisted	Organization	Organization Type Continum of Care	Field Office PHA Designation	Tribe Aware	
	-	The remainder of	this page is inte	entionally left blar	ık.	



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

User F	User Role: Grantee and HUD Users		Menu Option: Q Manage Requests					
6 T	6 The Assignments tab displays the assignment to which the Request is associated, if assig							
	Disaster Recovery Grant Reporting System			💼 🛠 🏛- \$- Ф- &- 🖢- L- inseignane				
	🧰 Manage Request			4 Back				
	HUD Request ID: Requestor: Request Submission Date: Status:	Jane Doe 12/21/2020 S Approved	Approved TA Type: Approver: Approve Date: Subject:	TA - Admin John Smith 12/25/2022				
	Details	Recipi	ents	Assignments				
	Requestor Details	Nane Organization Email Phone:	Jane Dos AC Associates requestor 1 (Januccom 240-240					
	Point of Contact	Nane Organization Graphization Type English Photoe:						
	Request Topics	ONAP: Indian Housing Block Grant						
	Problem Details	housing authority would like to review current policies and proce	dures and revise and strengthen them if possible to assure nahasda	compliance.				
	Decision Summary	Decision Summary - 1						
	HUDLOV	56	GR REA					

B3. HUD | Edit Request Status

Use	r Role: HUD Users with Ma Assignments role	inage TA	Menu Option: Q Manag	ge Requests
Pur	pose: Allow HUD Users wit	h the Manage TA	Assignments role to edit t	he Request status.
	Complete the following	steps to edit an e	existing Technical Assistan	ce Request:
1	Follow the steps in Sectio	n B1 to search foi	r a Technical Assistance Re	equest.
2	Authorized HUD Users wi Status by selecting the <e< b=""> Management and Certific</e<>	th the Manage TA dit> link next to t ation for more in	A Assignments role will have head head head head head field in the head formation on user roles.	ve an option to edit the Request er. See Chapter 5 on User
	CPD Disaster Recovery Grant Reporting System			▲ ① · \$- 亞- €- 坐- ▲- Inter-Control
	HUD Request ID: Requestor: Request Submission Date: Status:	Jane Doe 12/21/2020 ⊘ Approved <mark>22 tast</mark>	Approved TA Type: Approver: Approve Date: Subject:	TA - Admin John Smith 12/25/2022
	Details		Recipients	Assignments



User	Role: HUD Users with Assignments ro	n Manage TA Ile	Menu Option: Q Manage Requests	
3	The "Update Request Approved, Assigned,	: Status" page is displa Cancelled, Closed, In F	layed. The status can be updated to the following options: Progress, or On Hold.	
	Update Request Status		×	
	* Request Status:	Approved	↓	
	Comments:			
	Enter reason for updating the requ	Jest status	Cancel	

B4. HUD | Associate Existing Assignment to Request

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Requests				
Purpose: Allow HUD Users with the Manage TA Assignments role to associate the request to an existing Technical Assistance Assignment.					
Complete the following steps to associate Assistance Request:	e an existing Technical Assistance Assignment to the Technical				
1 Follow the steps in Section B1 to search for a Technical Assistance Request.					
The remainder of this page is intentionally left blank.					



Assignn	ers with the M nents role	anage TA	Menu Option: Q Mai	nage Requests	
Authorized HUD Users with the Manage Ass Assignment by selecting the <associate b="" exis<=""></associate>			signments role may ass sting Assignment> link (sociate the reque on the Assignme	est to an existing TA nt tab.
CPD Disaster Recovery Gr	ant Reporting System			<u>ه</u>	・ 血 - \$-
🧰 Manage R	equest				< Back
HUD Request ID: Requestor: Request Submission D Status:	ate:	Jane Doe 12/21/2020 ⊘ Approved <mark>gf Edit</mark>	Approved TA Type: Approver: Approve Date: Subject:		TA - Admin John Smith 12/25/2022
	Details		Recipients		Assignments
Assignments No Assignments found					Associate Existing Assignment
The "Associat "Associate As fields are pop	e Assignment" signment Searc ulated, choose	page is display ch Fields" table <search></search> .	ved. Enter the search cr below for a description	iteria to locate a n of each search	TA Assignment. See field. After the desired
The "Associate "Associate Ass fields are pop Associate Assign	e Assignment" signment Searc ulated, choose	page is display h Fields" table <search></search> .	ved. Enter the search cr below for a description	iteria to locate a n of each search	TA Assignment. See field. After the desired ×
The "Associate "Associate Ass fields are pop Associate Assign	e Assignment" signment Searc ulated, choose nment t you wish to associate w	page is display th Fields" table <search></search> . th this Request	ved. Enter the search cr e below for a description	iteria to locate a n of each search	TA Assignment. See field. After the desired ×
The "Associate "Associate As fields are pop Associate Assign Select an assignmen Search Crite	e Assignment" signment Searc ulated, choose ment t you wish to associate w ria	page is display ch Fields" table <search></search> . th this Request	ved. Enter the search cr e below for a description	iteria to locate a n of each search	TA Assignment. See field. After the desired
The "Associat "Associate As fields are pop Associate Assign Select an assignmen Search Crite Assignment ID:	e Assignment" signment Searc ulated, choose ment t you wish to associate w ria • Enter Assignment ID	page is display ch Fields" table <search></search> .	ved. Enter the search cr e below for a description	iteria to locate a n of each search	TA Assignment. See field. After the desired
The "Associat "Associate Ass fields are pop Associate Assign Select an assignmen Search Crite Assignment ID: Organization Assisted:	e Assignment" signment Searc ulated, choose ment t you wish to associate w ria • Enter Assignment ID Enter Organization	page is display ch Fields" table <search></search> . 	ved. Enter the search cr e below for a description Field Office: TA Type:	iteria to locate a n of each search Select One Select One	TA Assignment. See field. After the desired
The "Associat "Associate Ass fields are pop Associate Assign Select an assignmen Search Crite Assignment ID: Organization Assisted:	e Assignment" signment Searc ulated, choose ment t you wish to associate w ria • Enter Assignment ID Enter Organization	page is display ch Fields" table <search></search> . 	ved. Enter the search cr e below for a description Field Office: TA Type: Reset Search	iteria to locate a n of each search Select One Select One	TA Assignment. See field. After the desired
The "Associat "Associate Ass fields are pop Associate Assign Select an assignmen Search Crite Assignment ID: Organization Assisted:	e Assignment" signment Searc ulated, choose ment t you wish to associate w ria • Enter Assignment ID Enter Organization	page is display ch Fields" table <search></search> . 	ved. Enter the search cr e below for a description Field Office: TA Type: Reset Search	iteria to locate a n of each search Select One Select One	TA Assignment. See field. After the desired



User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Requests	
4 The search results will load. In the Search r results table headers. Users may also filter above the search results table. Select <sea< b=""></sea<>	results, the user can sort the results by selecting the sea r the search results by typing key words into the Search I arch> or <reset></reset> to restart the search.	rch ɔox
Associate Assignment		×
Select an assignment you wish to associate with this Request		
Search Criteria 🗸		
Assignment ID: Enter Assignment ID	Field Office: Select One	
Organization Assistad	TA Type: Select One 🗸	
	Reset Search	
Assignment ID + Field Office + Org	Search: Search	ssignor 🔶
D-100040	TA - Web/Knowledge Mngmt 06/20/2021	
O D-100040	TA - Web/Knowledge Mngmt 06/20/2021	
O D-100040	TA - Web/Knowledge Mngmt 06/20/2021	
O D-100040	TA - Web/Knowledge Mngmt 06/20/2021	
M First	4 Previous 1 2 3 20 Next Last	÷
 Once the desired TA Assignment has been the assignment. Then called C area 	Cancel	elect
TA Assignment. Then, select <save></save> to cre TA Assignment.	of this nage is intentionally left blank	ected



Use	r Role: HUD Users with the Manage TA Assignments role			Menu Option: Q Manage Requests				
6	After selecting <save></save> , the "Associate Assignment" page will close. The "Manage Request" page will be refreshed, and the s TA Assignment will appear in a table on the Assignment tab.		te 1anage d the se e on the	elected	TIP! A TA Request ma assignment at a time Existing Assignment" that were previously an association is mad	ay only be asso . Therefore, th and "Add Ass displayed will le.	ociated with ne "Associat ignment" lir be hidden a	one e hks ifter
					7-21-76-0011	▲ & 1 , 5,		T019GALast, T019GAFin
	Manage Requ				211/1/1001			(101950) (Bac
	HUD Request ID: Request Submission Date: Status:	99 Helaine Blu 08/27/201 © Approve	18 m 14 3d		Approved TA Type: Approver: Approve Date: Subject:	Assistan governance m what, if a ma	TA - On-Call Kevin Kissinger 09/08/2014 ce with reviewing CoC dels and determining ny, changes should be de to our existing CoC governance	(USUS) (Bac
	HUD Request ID: Requestor: Request Submission Date: Status:	est 95 Helaine Blu 08/27/20 Approve	18 m H4 H4 Recipients		Approved TA Type: Approver: Approve Date: Subject:	Assistan governance m what, if a ma	TA - On-Call Kevin Kissinger 09/08/2014 ce with reviewing CoC odels and determining ny, changes should be de to our existing CoC governance	(10300) (Bac
	HUD Request ID: Requestor: Requestor: Request Submission Date: Status: Details	95 Helaine Blu 96 Helaine Blu 98[27]20 © Approve	98 m 14 3d Recipients	Organization Assi	Approved TA Type: Approver: Approve Date: Subject: Assignments	Assistan governance m what, if a ma	TA - On-Call Kevin Kissinger 09/08/2014 oce with reviewing CoC doles and determining ny, changes should be de to our existing CoC governance Documents	(USUS) (Bac
	Assignment ID	Helpinding System UEST S Helaine Blu 08/27/20 ♥ Approve TA Provider Abt Associates Inc	98 m 14 3d Recipients TA Type TA - On-Call	Organization Assi	Approved TA Type: Approver: Approve Date: Subject: sted <u>I Last Modified By</u> See TA Portal Record	Assistan governance m what, if a ma	TA - On-Call Kevin Kissinger 09/08/2014 oce with reviewing CoC dels and determining ny, changes should be de to our existing CoC governance Documents	(USUS)
	HUBSAGE RECOVERY GRANT Manage Requ HUD Request ID: Requestor: Request Submission Date: Status: Operation Assignments T-338 T-302	Helporoling Ofstern UEST S Helaine Blu 08[27]00 ↑ TA Provider Ab Associates Inc Technical Assistance Collaborative	28 m 14 2d Recipients TA Type TA - On-Call TA - On-Call	Organization Assi	Approved TA Type: Approver: Approver: Subject: sted Last Modified By See TA Portal Record See TA Portal Record	Assistan governance m what, if a ma • Last Modified On 08/04/2021 08/04/2021	TA - On-Call Kevin Kissinger 09/08/2014 oce with reviewing CoC dels and determining ny, changes should be de to our existing CoC governance Documents Documents Search: Search: Search: Assigned Assigned	< Bac Actions () C C C C C C C

Associate Assignment Search Fields

Field	Guidance
Assignment ID	The unique Assignment ID that is created for TA Assignment.
Field Office	Drop down with Field Offices user has access to
Organization Assisted	The organization that will benefit from the TA provided.
ТА Туре	Drop down of the type of TA that the assignment will provide.

B5. HUD | Disassociate a TA Request from a TA Assignment

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Requests
Purpose: Allow HUD Users to delete an associat	ion between a TA Request and Technical Assistance Assignment.

Complete the following steps to disassociate a Technical Assistance Assignment from a Technical Assistance Request:

 \mathbf{M}



Use	r Role:	HUD Users with the Ma Assignments role	nage TA	Menu Option: Q Manag	ge Requests
1	Follov	v the steps in Section B1	to search for	a Technical Assistance Re	equest.
2	Select a tabl	the Assignments tab. The Select the trash can icc	e TA Assignm on (m) in the '	nent to which the TA Requ "Action" column to delete Becipients	est is associated will be displayed in the desired association.
3	A con	firmation dialog box will b	he displayed	near the top of the "Man	06/20/2021 Assigned
J	Confir Confir Reque	m the delete action. NOT est and TA Assignment is ster Recovery Grant Reporting System anage Request tequest ID: stor: st Submission Date:	9003 Jane Doe 12/21/2020	bissociate Assignment is not deleted; of the this action.	TA- Admin John Smith 12/25/2022

B6. HUD | Create Assignment from Request

User Role: HUD Users		Menu Option: Q Manage Requests		
Purpose: Allow HUD Users to create a new assignment from the TA Request.				
	Complete the following steps to create a new Technical Assistance Assignment from the Technical Assistance Request:			
1	Follow the steps in Section B1 to search for	a Technical Assistance Request.		



2 Authorized HUD users may create a new TA Assignment from the TA Request by selecting the **<Add Assignment>** link on the Assignment tab. The "Add Assignment" page is displayed. Follow the steps in Section C3 to create a new TA Assignment. **NOTE**: When creating an assignment from a Request, the HUD Request ID field is automatically populated.

TIP! When creating an assignment from a Request, the HUD Request ID field is automatically populated.

Details		
HUD Request ID:		
★ TA Provider:	\$	
* Appropriation:	Select One	
* TA Type (Activity Category):	Select One	
* Assignment Summary:		
	File Edit View Insert Format Tools Table	
	$B \ I \ \sqcup \ \blacksquare = \blacksquare \equiv \blacksquare \blacksquare \lor \boxplus \lor \ \backsim \ \mathcal{S}$	
	h. h	
★ Assignment Scope:	File Edit View Insert Format Tools Table	
	File Edit View Insert Format Tools Table	
	BIUEEEEEEEE	
Topics/HUD Programs:		
	Energy and Environment	
	CC: Benchmarking and utility data analysis	
	CC: Better Buildings Challenge (BBC)	
	CC: Energy efficiency and high-performance building retrofits for assisted	
	housing properties	
	CC: Environmental Reviews for the National Environmental Policy Act (NEPA) and	
	related federal environmental laws and authorities	
	CC: Lead Hazard Control and Healthy Homes	
	CC: NSPIRE and Inspection related TA	

B7. HUD | Add Supporting Documents to Request

Use	er Role: HUD Users	Menu Option: Q Manage Requests
Purpose: Allow HUD Users to to add supporting		documents to TA Request.
1	1 Follow the steps in Section B1 to search for a Technical Assistance Request.	



2 Authorized HUD users can click on Documents tab to add supporting documents.

CPD Disaster Recovery Grant Reporting Sy	stem	Abt Associates Inc C-20-TA-MD-0001	🔒 🕅 徐 盦, \$, 極, 倭, 堂, L, TOISFOLASI, TOISFO
🧰 Manage Request			4
HUD Request ID: Requestor: Request Submission Date: Status:	998 Helaine Blum 08/27/2014 © Approved	Approved TA Type: Approver: Approve Date: Subject:	TA - On-Call Kevin Kissinger 09/08/2014 Assistance with reviewing CoC governance models and determining what, if any, changes should be made to our existing CoC governance
Details	Recipients	Assignments	Documents
Supporting Documents () The file size limit is 3MB. Valid file extensions of No results found. Supporting Links () No results found.	are:.pngglf,.jpgjpegdoc,.docx,.xks,.xkx,.csv,.ppt,.p;	str, and .pdf.	Add Document Add Link
Click on Add Docume	nt link to open the Add	×	
* Select Access Type: O Private			4B
Select File to Upload: Choose F	ile no file selected		TA - On-Call Kevin Kissinger 09/08/2014 Assistance with reviewing CoC
Bec	:ipients	Assignments	determining what, if any, changes should be made to our existing CoC governance
ire: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xl	sx, .csv, .ppt, .pptx, and .pdf.		Add Document
			O Add Link
win			
Users can specify Acc the document to this	ess Type (Public or Priver request.	ate) and select a file to uplo	oad. Clicking on Save will upload
Uploaded documents the documents and A	are displayed under Su ccess Type using the ac	pporting Documents grid. tions highlighted below.	Users can Delete, View, and Edit
Supporting Documents 1 The file size limit is 3MB. Valid file extensions are Name Date	: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .ppt Type Access	x, and .pdf. Uploaded By Group	Add Document Uploaded By Actions
Sample.pptx 03/02/202	22 PPTX Private	HUD Users	T015FOFirst T015FOLast
Supporting Links			O Add Link



_	Add External Link				×
e Request	NOTE: DRGR is not responsible for exte	rnal URL Links.			
D:	Link Nama:	Enter Name			TA - On-Call
ission Data		Enter Name			Kevin Kissinger
		Enter UKL		Cancel	Assistance with reviewing CoC governance models and ermining what, if any, changes should be made to our existing CoC governance
Details	F	Recipients		Assignments	Documents
Links 이					
Any supporti tab. Users ca	ng links added to In Delete, View, ar	the Request and Edit these	are displayed ur links using actic	nder Supporting Lir ons highlighted belo	nks section of Documents
Any supporti tab. Users ca	ng links added to t In Delete, View, ar	the Request and Edit these Recipients	are displayed ur links using actic	nder Supporting Lir ons highlighted belo Assignments	nks section of Documents DW.
Any supporti tab. Users ca Supporting Docu The file size limit is 3MB Name	ing links added to the set of the	the Request and Edit these Recipients	are displayed ur links using actic .ppt, and .pdf. Uploaded By Group	nder Supporting Lir ons highlighted belo Assignments Uploaded By	nks section of Documents DW. Documents
Any supporti tab. Users ca Supporting Docu The file size limit is 3ME Name Sample.pptx	ing links added to the statistic of the	the Request and Edit these Recipients .doc, .docx, .sts, .tsx, .csyppt, Type Access PPTX Private	are displayed ur links using actic .ppt, and .pdf. Uploaded By Group HUD Users	nder Supporting Lir ons highlighted belo Assignments Uploaded By TOISFOFIIST	nks section of Documents DW. Documents
Any supporti tab. Users ca Supporting Docu The file size limit is 3MB Name Sample.pptx	ing links added to the second	the Request and Edit these Recipients doc, docx, als, alsa, csy, ppt, Type Access PPTX Private	are displayed ur links using actic .pptr, and .pdf. HUD Users	nder Supporting Lir ons highlighted belo Assignments Uploaded By T015FOFirst	nks section of Documents DW. Documents Constitution Constitution

C. Manage Assignments

The DRGR System allows authorized HUD Users to create a Technical Assistance Assignment from an approved Technical Assistance Request (see Section B6). The system also allows these users to create assignments that do not originate from Technical Assistance Requests.

C1. HUD | Create TA Assignments

The System allows HUD Users with the Manage TA Assignments role to create a Technical Assistance Assignment.

User Role: HUD Users	Menu Option: ①Add Assignment				
Purpose: Allow HUD Users to create a Technical Assistance Assignment.					
Complete the following steps to create a T	echnical Assistance Assignments:				
1 To create a TA Assignment, navigate to the Select the <add assignment=""></add> link. The "Add	Manage My Grants module and locate the Work Plans menu. Assignment" page will load.				



Add Assignment		
Details		
HUD Request ID:		
* TA Provider:	\	
* Appropriation:	Select One	
★ TA Type (Activity Category):	Select One	
* Assignment Summary:	File Edit View Insert Format Tools Table	
	$ \begin{array}{c c} B & I & \Psi \end{array} \equiv \Xi \equiv \Xi \end{array} \equiv \Xi \lor \Xi \lor \checkmark \backsim \circlearrowright \boxplus \lor \mathscr{P} $	
* Assignment Scope:	File Edit View Insert Format Tools Table B I U = = = :	4
Topics/HUD Programs:		
Topics/HUD Programs:	Energy and Environment	k
Topics/HUD Programs:	Energy and Environment CC: Benchmarking and utility data analysis CC: Better Buildings Challenge (BBC)	
Topics/HUD Programs:	Energy and Environment ^ CC: Benchmarking and utility data analysis CC: Benchmarking and utility data analysis CC: Better Buildings Challenge (BBC) CC: Energy efficiency and high-performance building retrofits for assisted housing properties	ß
Topics/HUD Programs:	Energy and Environment CC: Benchmarking and utility data analysis CC: Better Buildings Challenge (BBC) CC: Energy efficiency and high-performance building retrofits for assisted housing properties CC: Environmental Reviews for the National Environmental Policy Act (NEPA) and related federal environmental laws and authorities 	Æ
Topics/HUD Programs:	Energy and Environment CC: Benchmarking and utility data analysis CC: Better Buildings Challenge (BBC) CC: Energy efficiency and high-performance building retrofits for assisted housing properties CC: Environmental Reviews for the National Environmental Policy Act (NEPA) and related federal environmental laws and authorities CC: Lead Hazard Control and Healthy Homes	Æ



2 HUD Users must complete several fields to create a new Technical Assistance Assignment. These items are detailed in the Assignment Details table below (required fields are marked by an asterisk (*)). Complete the required fields. Then, select **<Save>**. The TA Assignment will be created and the "Manage Assignment" page will open.

	lent		
Assignment ID: TA Type: TA Provider: Status:	TA - Web/Knowledge Mngmt ØAssigned	Assigner: Last Modified By: Last Modified Date: Request Last Modified Date:	06/20/2021 06/18/2021 gf tel
Details	Requests	Organizations	Work Plans
Additional Details			
Assignment Summary	test mj 06202021		G r Edit
Assignment Scope	test		(2 ⁴ Edit
Appropriations	2018 Departmental		
		DRGR R84	
HUD.GOV		an view the following information	in the header: Assignmen
Dn the "Manage As D, Assigner, TA Typ Modified Date. Follo	signment" page, users c e, Last Modified By, TA I owing tabs are available	Provider, Last Modified Date, State on the page: Details, Recipients, a	us, and Request Last and Assignments.
Dn the "Manage As D, Assigner, TA Typ Modified Date. Follo	signment" page, users c e, Last Modified By, TA I owing tabs are available ent	Provider, Last Modified Date, Stati on the page: Details, Recipients, a	us, and Request Last and Assignments.



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

4	Following information is available on Details tab: Assignment Summary, Assignment Scope, Appropriations, and Topics/HUD Programs.
5	A list of the requests that are associated with the TA Assignment is displayed on the Requests tab.
6	The Organizations tab displays the organization groups and individual organizations that will benefit from the TA Assignment.



Details					
Details	Requests		Organizations		Work Plans
Work Plans					Search:
Work Plan Number	0 Work Plan Type	Last Updated By	Last Updated Date	Status	¢ Actions ¢
and a second					ß
					Ø
					C

Assignment Details

Element	Description
HUD Request ID	This element only appears when a Technical Assistance Assignment is created from an approved Technical Assitance Request. It is pre- populated with the HUD Request ID from which the Assignment is created and cannot be modified.
TA Provider*	The TA Provider to which the Assignment will be given.
Appropriation*	The recommended Cooperative Agreement Number(s) under which the work could be performed.
TA Type (Activity Category)*	The TA Type, or Activity Category, of the Assignment.
Assignment Summary*	A brief description of the Assignment.
Assignment Scope*	A description of the scope of the Assignment.
Topics/HUD Programs	The HUD Programs or topics to which the Assignment is related. NOTE : If "Other" is selected, a brief description of the topic must be added.

The remainder of this page is intentionally left blank.



C2. Grantee and HUD | Search for TA Assignments

The System allows Grantee Users associated with a TA Provider and HUD Users to search for TA Assignments.

iose: Allow C	Grantee Users associated	with a TA Prov	vider and HU[OUsers to search for	existing TA
gnments.					U
Complete	the following stone to a	anah aviating	Tachnical Acci	stance Assignments.	
Complete	the following steps to se	arch existing	ecnnical Assi	stance Assignments:	
To search fo	or a TA Assignment, navig	gate to the Ma	nage My Grai	nts module, locate the	e Work Plans men
and select t	he <manage assignment<="" th=""><th>s> link. The "Ν</th><th>lanage Assigr</th><th>nments" page will load</th><th>d.</th></manage>	s> link. The "Ν	lanage Assigr	nments" page will load	d.
Disaster Recover	ry Grant Reporting System			· · · · · · · · · · · · · · · · · · ·	\$- \$- @- () - * - 2 - 10626A,106
Manage	Assignments				
	Assignments				Show More Criter
Request ID:	Enter Request ID		Assignment ID:	Enter Assignment ID	
TA Provider:		~	TA Type:	Select One	~
Assignment Date:	mm/dd/yyyy	=	Assignment Status:	Select One	~
		Rese	Search		
ниром			DIIGI REA		
HUDGOV			DIGR R84		
HUBDOV On the "Ma	nage Assignments" page	, enter search	oucress criteria to acc	cess the desired Assig	nment. See "Mana
HURKY On the "Ma Assignment	inage Assignments" page :s Search Fields" table bel	, enter search ow for descrip	criteria to accontion of search	cess the desired Assig h fields.	nment. See "Mana
On the "Ma Assignment Manage	nage Assignments" page s Search Fields" table bel Assignments	, enter search low for descrip	criteria to accontion of search	cess the desired Assig h fields.	nment. See "Mana
On the "Ma Assignment Manage Search Criteria	inage Assignments" page :s Search Fields" table bel Assignments	, enter search low for descrip	orates criteria to acc otion of search	cess the desired Assig h fields.	nment. See "Mana stee Les Cit
Muccov On the "Ma Assignment Manage Search Criteria - Request ID: Ta Browder	inage Assignments" page :s Search Fields" table bel Assignments	, enter search low for descrip	criteria to accontion of search	cess the desired Assig h fields.	nment. See "Mana Show Less Cri
VUDCOV On the "Maa Assignment Manage Search Criteria - Request ID: TA Provider: Assument Date:	Inage Assignments" page Is Search Fields" table bel Assignments	, enter search low for descrip	orcated criteria to acco otion of search Assignment ID: TA Type: Assignment Status:	cess the desired Assig h fields.	nment. See "Mana shev Les Cit
ULDOOV On the "Ma Assignment Manage Search Criteria - Request ID: TA Provider: Assignment Date: Organization Assisted:	Inage Assignments" page Is Search Fields" table bel Assignments	, enter search low for descrip	DICITAL criteria to acco ption of search Assignment ID: TA Type: Assignment Status: Last Modified By:	cess the desired Assig h fields.	nment. See "Mana shee Les Cat
VLULUOV On the "Ma Assignment Manage Search Criteria - Request ID: TA Provide: Assignment Date: Organization Assisted: HUD Region:	Inage Assignments" page, Is Search Fields" table bel Assignments	, enter search low for descrip	Criteria to accontion of search Assignment ID: TA Type: Assignment Status: Last Modified By: Organization States:	Cesss the desired Assig h fields.	nment. See "Mana stee co
NUDCOV On the "Ma Assignment Manage Search Criteria • Request ID: TA Provider: Assignment Date: Organization Assisted: HUD Region:	Inage Assignments" page, Is Search Fields" table bel Assignments	, enter search low for descrip	DECI BA Criteria to acco btion of search Assignment ID: TA Type: Assignment Status: Last Modified By: Organization State:	cess the desired Assig h fields. Enter Assignment ID Select One Enter Name Select Option	nment. See "Mana steve less Cet



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

ivianage R	equests							
Search Criteria							Show	Less Crit
Request ID:	Enter HUD Request ID		Status:	Select One			~	
Field Office:	Select Option	~	Topic:	Select One			~	
Subject:	Enter Keyword		Organization Assisted:	Enter Organization				
Last Approved By:	Enter Name		Organization Type:	Select One			~	
Organization State:	Select Option	~	TA Provider:	Select One			~	
Approved Date From:	mm/dd/yyyy	i	Approved Date To:	mm/dd/yyyy			=	
Request ID Subjec	t	TA Provider	Organization Assisted Field Off	Request Submitted ice On	Last Approved On	Last Approved By	Status	Acti
ID Subjec	t	Provider	Organization Assisted Field Off	ice On	On	Ву	Status	Acti
							Approved	
							Approved	8
							Approved Approved Approved	8
							Approved Approved Approved Approved	8
							Approved Approved Approved Approved Approved	2 2 2 2
							Approved Approved Approved Approved Approved Approved	2 2 2 2 2 2 2 2
					1		Approved Approved Approved Approved Approved Approved Approved	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
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					-		Approved Approved Approved Approved Approved Approved Approved Approved	
							Approved Approved Approved Approved Approved Approved Approved Approved Approved	
		M First	Previous 1 2 3 - 6 heat Last M				Approved Approved Approved Approved Approved Approved Approved Approved Approved Show	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2

The remainder of this page is intentionally left blank.



Manage Assignments Search Fields

Field	Guidance
Request ID	The unique Technical Assistance request identification number that was assigned to the Request when it was entered in HUD Exchange.
Assignment ID	The unique idenification number assigned to the Technical Assistance Assignment.
TA Provider	The TA Provider organization to which an assignment was given.
ТА Туре	The TA Type (or Activity Category) of the Assignment.
Assignment Date	The date on which the assignment was given to the TA Provider.
Assignment Status	The current status of the TA Assignment.
Organization Assisted	An individual organization that will benefit from the TA Assignment.
Last Modified By	The data the TA Assignment was last modified.
HUD Region	The HUD Region of the TA Provider.
Organization State	The state of the organization assisted.

C3. Grantee and HUD | View TA Assignments

The System allows authorized users to view TA Assignments.

User Role: Grantee and HUD Users	Menu Option: Q Manage Assignments
Purpose: Allow Grantee Users associated with a	TA Provider and HUD Users to view existing TA Assignments.
Complete the following steps to view exist	ting Assignments:
1 Follow the steps in Section C2 to search for	a Tachnical Assistance Assignment



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

er Role: Grantee and HUD Users							Menu	Option:	Q Manag	ge Assignn	nents	Menu Option: Q Manage Assignments					
lr co	the " olumr	'Search n to viev	w or e	ts" section dit the de	on of the esired Ass	"Mana signme	age Assi ent.	gnments	" page, se	elect the i	con in th	ne "Action"					
	Copy Prin	It CSV Exce	1														
	Request ID	Assignment ID	TA Provider	ТА Туре	Organization Assisted	Requestor	Request Approver	Request Approval Date	Assignment Last Updated By	Assignment Last Modified On	Assignment Status	Notification Last Sent Actions					
			-	-						-	-	đ					
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C4. HUD | Delete TA Assignment

The DRGR system will allow HUD users with the Manage TA Assignments role to delete a TA Assignment.

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Assignments						
Purpose: Allow authorized HUD Users to delete a	Purpose: Allow authorized HUD Users to delete a TA Assignment that is still in "Drafted" status.						
Complete the following steps to delete a T	echnical Assistance Assignment:						
1 Follow the steps in Section C2 to search for	Follow the steps in Section C2 to search for a Technical Assistance Assignment.						
2 In the "Search Results" section of the "Mana "Action" column to delete the desired Assig Search Results 10 (Copy Print CSW Excel Request Assignment TA Organization	age Assignments" page, select the trash can icon (m) in the nment.						
ID ID Provider TA Type Assisted Requestor	Approver Approval Date Updated By Modified On Status Sent Actions						
	Drafted R T						



Use	r Role: HUD U Assigni	sers with the Manage TA ments role	Menu	u Option: Q	Manage Assignment	S
3	A confirmation <ok></ok> to cont	on dialog box will be displayed firm the delete action.	near th	e top of the	"Manage Assignmen	its" page. Select
	CPD Disaster Recovery G	rant Reporting System	Delete TA A	ssignment ×	▲ 谷 血・	\$~ 💁~ 🛠~ 🕁~ 🏝~ Stone Stephanie
	Manage Assignments		Are you sure you v	vant to delete the	4 Back	
	Search Criteria 👻		selected assignme	ntr	Show More Criteria	
	Request ID:	Enter Request ID		Cancel OK	Enter Assignment ID	
	TA Provider:	Select One	~	ТА Туре:	Select One	~
	Assignment Date:	mm/dd/yyyy	-	Assignment Status:	Select One	~
			Reset	Search		

Search Res	sults 100 nt CSV Exce	1										
Request ID	Assignment ID	TA Provider	ТА Туре	Organization Assisted	Requestor	Request Approver	Request Approval Date	Assignment Last Updated By	Assignment Last Modified On	Assignment Status	Notification Last Sent	Actions
9003	D-100060	ICF Incorporated	Admin		Jane Doe	John Smith		Kenneth Rogers	06/28/2021	Drafted		C I
9002	D-100060	ICF Incorporated	Admin		John Smith	Kavitha Vemula	12/16/2020	Kenneth Rogers	06/28/2021	Drafted		21

C5. HUD | Notify TA Providers of an Assignment

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Assignments						
Purpose: Allow HUD Users with the Manage TA Assignments role to send notifications to a TA Provider about a TA Assignment.							
Complete the following steps to notify a T	Complete the following steps to notify a TA Provider about a TA Assignment:						
1 Follow the steps in Section C2 to search for	1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.						
2 To notify TA Providers about a TA Assignment, select the <notify provider="" ta=""></notify> link above the header. ImManage Assignment							
Assignment ID: TA Type: TA - Web/Knowledge Mngmt TA Provider: Status: ©Assigned	Assigner: Last Modified By: Last Modified Date: 06/20/2021 Request Last Modified Date: 06/18/2021 (2 Gat						
Details Requests	Organizations Work Plans						



User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Assignments
3 The "Create Email" page will be displayed. U select <send></send> . A notification will be sent to	Jpdate the recipients and email content as desired. Then, specified email recipients.
CPD Disaster Recovery Grant Reporting System	🔒 💣 血- \$- 亞- &- 🖢-
Create Email "Indicate Require Fiel Note: Multiple email addresses must be separated by a semi-colon. For Example: abc@hud.gov: xyz@hud.gov "[]]]; TAProvider@example.com[
Cc : HUDUsers@example.com	
*Subject:	
DRGR Notification[53] - Assignment # D-100000 for TA Provider	
Message: DRGR Notification[53] - Assignment # D-100000 for TA Provider	
Send Cancel	
ниркох	DIGR RL4

C6. HUD | Modify TA Assignment Status

User Rol	le: HUD Users with the N Assignments role	1anage TA	Menu Option: Q Manage Assig	gnments		
Purpose	: Allow HUD Users with	the Manage TA A	Assignments to modify a TA Assig	gnment's status.		
C 🖌	omplete the following st	eps to modify a 1	ΓΑ Assignment's status:			
1 Fol	1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.					
2 To	2 To edit the assignment details, select the "Edit" link in the header.					
	Assignment ID: TA Type: TA - Web/Kr TA Provider: Status:	owledge Mngmt ØAssigned	Assigner: Last Modified By: Last Modified Date: Request Last Modified Date:	06/20/2021 06/18/2021 If fat		
	Details	Requests	Organizations	Work Plans		



Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

Edit Assignment		
Details		
HUD Request ID:		
★ TA Provider:	÷	
* Appropriation:	•	
★ TA Type (Activity Category):	Select One	
* Status:	Drafted 🗢	
* Assignment Summary:	File Edit View Insert Format Tools Table	
	$B \ I \ \sqcup \ \blacksquare = \blacksquare \equiv \blacksquare \ \boxminus \lor \blacksquare \lor \ \diamondsuit \ \varnothing$	
★ Assignment Scope:		1
Assignment scope.	File Edit View Insert Format Tools Table	
	Assignment Scope	
Assignment Status Comments:	Ele Edito Maren Incorte Tanto Table	11
	Pile Edit View Insert Format Iools Jable	
Topics/HUD Programs:	FHEO: Fair Housing Act (Title VIII of the Civil Rights Act of 1968) FHEO: National Fair Housing Training Academy Homelessness CPD-SN: Chronic Homeless CPD-SN: CoC Coordinated Entry CPD-SN: CoC Governance CPD-SN: CoC Governance CPD-SN: CoC Performance measure CPD-SN: CoC Performance measure CPD-SN: CoC Performance measure CPD-SN: Emergency Solutions Grant Program (ESG)	ß



User Role: HUD Users with the Manage Assignments role	e TA Menu Option: Q Manage Assignments
4 To modify the assignment status, between the TA Type (Activity Cat	select the desired status from the status field which is located tegory) and Assignment Summary field.
* TA Type (Activity Category): Select O	Une 🗸
* Status: Drafted	¢
* Assignment Summary: File Ed B I Assign	dit View Insert Format Tools Table U E E E ✓ ✓ ✓ Image: Comparison of the second se
5 If desired, enter a comment to ex which is located between the Ass * Assignment Scope: B I Assign	Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Scope and Topics/HUD Programs fields. Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Status Comments field, Applain the modification in the Assignment Status Comments field, Applaint Tools Table
Assignment Status Comments: File Ed B I Topics/HUD Programs: F P Homele C C C C	dit View Insert Format Tools Table U Image: Ima
6 Verify a response is entered for eau updated.	ach required field. Then, select <save>.</save> The TA Assignment will be

C7. HUD | Edit TA Assignment Details

User Role: HUD Users with Manage TA Assignments	Menu Option: Q Manage Assignments		
Purpose: Allow HUD Users with the Manage TA Assignments role to modify a TA Assignment's details.			



User Role: HUD Users with Manage TA Assignments	Menu Option: Q Manage Assignments				
Complete the following steps to modify a	TA Assignment's details:				
1 Follow the steps in Section C2 to search for	and open the desired Technical Assistance Assignment.				
2 To edit the assignment details, select the <e< b=""> Section C6, Step 3) will open.</e<>	dit> link in the header. The "Edit Assignment" page (See				
Assignment ID: TA Type: TA - Web/Knowledge Mngmt TA Provider: Status: ©Assigned	Assigner: Last Modified By: Last Modified Date: 06/20/2021 Request Last Modified Date: 06/18/2021				
Detail Requests NOTE: The Assignment Summary and Assign <edit> link for each section.</edit>	Organizations Work Plans Temperature of the edited individually by selecting				
Details Requests	Organizations Work Plans				
Additional Details					
Assignment Summary test mj 06202021	Cd Ede				
Assignment Scope test	12 Edit				
Appropriations 2018 Departmental					
Topics/HUD Programs					
3 Update the desired fields. Then, select <sav< b=""> about changes in the Assignment by selectir</sav<>	e>. NOTE: If necessary, be sure to Notify TA Providers ng the <notify providers<="" ta="" th=""></notify>				

the "Manage Assignment" page.

C8. HUD | Associate TA Requests with an Assignment

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Assignments				
Purpose: Allow HUD Users with the Manage TA Assignments to associate an assignment with an existing TA Request.					
Complete the following steps to associate TA Requests with an Assignment:					
1 Follow the steps in Section C2 to search for	and open the desired Technical Assistance Assignment.				



Use	r Role: HUD U Assigni	sers with the Manage TA ments role	Menu Option: Q	Vanage Assignments	
2	Select the th Assignment i	e Requests tab. A list of the re s displayed. Select the < Assoc	quests that are curre siate Existing Request	ently associated with the second s	TA its table.
	Requests 12 HUD Request ID	Field Office I Organization Assisted I Submis	Cryan	ications V	Asscate Existing Requests Actions
3	The "Associa access the de search fields Associate Requ	te Requests" page will open. C esired Request. See "Associate . After desired fields are popul ests	On the "Associate Rec Requests Search Fie ated, choose < Searcl	quests" page, enter searc lds" table below for desc ŋ>.	h criteria to ription of ×
	Search Crite	eria -			
	Request ID:	Enter HUD Request ID	Field Office:	Select Option •	•
	Organization Assisted:	Enter Organization	TA Type:	Select One	~
			Reset Search		
					Cancel Save
		The remainder of	this page is intentior	ally left blank.	



Use	r Role: HUD Use Assignm	ers with the Manage TA ents role	Menu Option: Q Ma	inage Assignments	
4	The search res results table he above the sear	ults will load. In the Search re eaders. Users may also filter t rch results table. Select <sear< b=""></sear<>	esults, the user can sor he search results by ty ch> or <reset></reset> to rest	t the results by selecting ping key words into the s art the search.	the search Search box
	Associate Reques	ts			×
	Select the available Re	equests you wish to associate with this Assignmen	t		
	Search Criter	ia 🗸			
	Request ID:	Enter HUD Request ID	Field Office:	Select Option	
	Organization Assisted	Enter Organization	TA Type:	Select One	~
	, 5515 cc 4.		Reset Search		
		_			
	Matching Resu	ılts 34		Search:	
	HUD Request	🔷 🔶 Organization 🔶	Approved Submission 🖨	Approved 🔶	÷
	ID ID	Field Office Assisted	TA Type Date	Date Subject	
	0				
	4				Cancel Save
5	Once the desir request. Then, Request(s). NC displayed in th	red TA Request(s) has been lo select <save></save> to create the a DTE: If a request is already ass e search results.	cated, select the check association between th sociated to a TA Assign	kbox in the first column to the TA Assignment and the ment, the request will no	o select the selected TA t be
6	After selecting be refreshed, a	Save> , the "Associate Requand the selected TA Request value	ests" page will close. T will appear in a table o	he "Manage Assignment' n the Requests tab.	" page will



Associate Request Search Fields

Field	Guidance
Request ID	The unique Request ID that is created when the request was submitted to HUD via the HUD Exchange.
Field Office	Drop down with Field Offices user has access to
Organization Assisted	The organization that will benefit from the TA provided.
ТА Туре	Drop down of the type of TA that the assignment will provide.

C9. HUD | Disassociate a TA Assignment from a TA Request

User Role	e: HUD Users with the Manage TA Assignments role	Menu Option: Q Manage Assignments
Purpose:	: Allow HUD Users to delete an associat	ion between a TA Assignment and Technical Assistance Request.
Co As	omplete the following steps to disassoci ssistance Request:	ate a Technical Assistance Assignment from a Technical
1 Folle	ow the steps in Section C2 to search for	a Technical Assistance Assignment.
2 Sele tabl	ect the Requests tab. The TA Request(s) le. Select the trash can icon (m) in the "A Details Requests Requests 12 HUD Request 10 © Field Office © Organization Assisted © Submi	to which the TA Assignment is associated will be dsplayed in a Action" column to delete the desired association.
3 A cc con Req	onfirmation dialog box will be displayed firm the delete action. NOTE : The TA As juest and TA Assignment is removed with Disaster Recovery Grant Reporting System Manage Assignment Ssignment ID: A Type: A Type: tatus: Details Details Details	near the top of the "Manage Requests" page. Select <ok></ok> to signment is not deleted; only the relationship between the TA the this action.

C10. HUD | Select Organizations Assisted Groups

The DRGR System allows authorized HUD Users to specify one or more organization groups to be assisted by a Technical Assistance Assignment.



User Ro	ble: HUD Users with Manage TA Assignments	Menu Option: Q Manage Assignments
Purpose	e: Allow HUD Users to specify the organ	nization groups to be assisted by a TA Assignment.
	Complete the following steps to one or Assistance Assignment:	more organization groups to be assited by a Technical
1 Fo	ollow the steps in Section C2 to search fo	or a Technical Assistance Assignment.
2 Se ort	elect the Organizatons tab. The Organizatons tab. The Organizations that will benefit from the TA ection.	ations tab displays the organization groups and individual A Assignment. Select <edit></edit> for the Organization Groups
	Details Requests Organizations Program(a): Davis-	Organizations Work Plans Iacon. Section 3 If Edit
	Individual Organizations Assisted Organization Assisted P	rogram Asst Sec Office Office Field Office Region State DUNS Actions Opencations
3 Th on list	Asignment ID: A Type: TA	pen near the top of the "Manage Assignment" page. Select gram Field. Then, select <save></save> . The selected groups will be

C11. HUD | Select Individual Organizations Assisted

The DRGR System allows authorized HUD Users to specify one or more organizations to be assisted by a Technical Assistance Assignment.

User Role: HUD Users with Manage TA Assignments	Menu Option: Q Manage Assignments
Purpose: Allow HUD Users to specify individual	organizations to be assisted by a TA Assignment.



Usei	Role: HUD U Assigni	sers with Ma ments	anage TA	Menu Option: Q	1anage Assignments	5
ď	Complete th Assignment	ne following : :	steps to one or n	nore organizations to	be assited by a Te	echnical Assistance
1	Follow the ste	eps in Sectior	n C2 to search fo	r a Technical Assistan	ce Assignment.	
2	Select the Org organizations Individual Org	ganizatons ta that will ber ganizations A	b. The Organiza hefit from the TA ssisted section.	tions tab displays the Assignment. Select t	organization grou he <add b="" organiza<=""></add>	ups and individual I tions> link for the
	Det	ails	Requests	Orga	izations	Work Plans
	Organizations					
			Designam(a) Davis Res	on Section 3		
	Organization Grou	lbs	Program(s): Davis-bac	on, section 5		La bat
	Individual Organiz	zations Assisted	Organization Assisted Prop	gram Aast Sec Office Office	Field Office Region State	e DUNS Actions Crystation
3	The "Add Rec locate the des description of Add Recipients Select the available	ipients" page sired Organiz search field Organizations you v	e will open. On th ration(s). See "Or s. After desired f vish to associate with this A	ne "Associate Recipie ganizations Assisted ields are populated, o	nts" page, enter se Search Fields" tab choose < Search >.	earch criteria to le below for ×
	Search Crite	eria 🝷				
	Organization Assisted:	Enter		Program:	Enter	
	Field Office:	Enter		Office:	Enter	
	Region:	Enter		Asst Sec Office:	Enter	
	DUNS Number:	Enter		Unique Entity Identifier:	Enter	
				Reset Search		



Jser Role: HU Ass	D Users with Manag ignments	e TA	Menu (Option: (Q Manage As	signmen	ts		
The search results tab above the	n results will load. In Ne headers. Users m search results table.	the Search r ay also filter Select <sear< b=""></sear<>	esults, th the searc ch> or <	ne user c ch results Reset> to	an sort the r s by typing k o restart the	esults b ey word search.	y select s into tl	ing the s he Searc	search h box
Add Recipi	ents								×
Select the ava	ailable Organizations you wish to	associate with this As	ssignment						
Search	Criteria 🝷								
Organizatio Assisted:	n Enter			Program:	Enter				
Field Office	Enter			Office:	Enter				
Region:	Enter			Asst Sec Office:	Enter				
DUNS Number:	Enter			Unique Enti Identifier:	ty Enter				
			Reset	Search					
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		Section 811	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY		
)	Project Based Section 8	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY		
		Project Based Section 8	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY		
		Project Based Section 8	HSG	Multifamily	GEORGIA STATE OFFICE	-	TN		
		Project Based	HSG	Multifamily	CALIFORNIA	-	CA		
								Cancel	B Save
		())		1 1					

the organization(s). Then, select **<Save>** to add the organization to the list of individual organizations that will be assisted.



User Role: HUD Users with Manage TA Assignments	Menu Option: Q Manage Assignments
6 After selecting <save></save> , the "Add Recipients refreshed, and the selected organization(s) on the Organizations tab.	" page will close. The "Manage Assignment" page will be will appear in the Individual Organizations Assisted table

Organizations Assisted Search Fields

Field	Guidance
Organization Assisted	The organization that will benefit from the TA Assignment.
Programs	HUD program(s) for which assistance is being provided.
Field Office	Field Offices associated to the assignment through the organization assisted.
Office	HUD Program Office that is monitoring the techical assistance that will be provided.
Region	The region to which the organization assisted is assigned.
Asst Sec Office	HUD Office responsible for monitoring the HUD Programs.
DUNS Number	DUNS Number of the organization.
Unique Entity Identifier	Unique Entity Identifier (UEI) of the organization.

C12. HUD | Add Supporting Documents to Assignments

Use	er Role: HUD Users	Menu Option: Q Manage Assignments
Pur	pose: Allow HUD Users to to add supporting	documents to TA Assignment.
1	Follow the steps in Section C2 to search fo	r a Technical Assistance Assignments.
2	Authorized HUD users can click on Docume	ents tab to add supporting documents.



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Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

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