



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

Chapter 9: Technical Assistance Requests and Assignments	2
A. Manage Requests and Assignments Access	3
A1. Grantee User Access	3
A2. HUD User Access.....	3
B. 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
C2. Grantee and HUD Search for TA Assignments.....	21
C3. Grantee and HUD View TA Assignments	23
C4. HUD Delete TA Assignment.....	24
C5. HUD Notify TA Providers of an Assignment.....	25
C6. HUD Modify TA Assignment Status	26
C7. HUD Edit TA Assignment Details	28
C8. HUD Associate TA Requests with an Assignment	29
C9. HUD Disassociate a TA Assignment from a TA Request.....	32
C10. HUD Select Organizations Assisted Groups	32
C11. HUD Select Individual Organizations Assisted	33
C12. HUD Add Supporting Documents to Assignments.....	36



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:

TA Provider Users

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

HUD Users

Menu Option	Section	Action
Upload Requests	--	See Chapter 34: Data Uploads
Manage Requests	B1 – B3	Search for, view, and edit TA Requests.
Add Assignment	C1	Add TA Assignments.
Manage Assignments	C2 – C4	Search for, view, edit, and delete TA Assignments.
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: Manage My Grants Module
Purpose: Allow Grantee Users associated with TA Providers to access TA Requests actions.	
<input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants Module:	
1 Select the Manage My Grants module, or icon, located in the navigation menu.	
2 This opens the dropdown menu for the Manage My Grants module. Navigate to the Work Plans menu. The System displays the relevant menu items based on user type and user roles.	

A2. HUD | User Access

User Role: HUD User	Menu Option: Manage My Grants Module
Purpose: Allow HUD Users to access TA Requests actions.	
<input checked="" type="checkbox"/> Complete the following steps to access the Manage My Grants Module:	
1 In the DRGR System, select the Manage My Grants module, or icon, located in the navigation menu.	
2 This opens the dropdown menu items for the Manage My Grants module. Navigate to the Work Plans menu. The System displays the relevant menu items based on user type and user roles.	



User Role: HUD User	Menu Option: Manage My Grants Module
---------------------	---------------------------------------

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: Manage Requests
----------------------------------	-------------------------------

Purpose: Allow Grantee and HUD Users to search and view existing Requests.

Complete the following steps to search existing 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>** 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>**. Search results will load.

Manage Requests

Search Criteria Show Less Criteria

Request ID: <input style="width: 90%;" type="text" value="Enter HUD Request ID ..."/>	Status: <input style="width: 90%;" type="text" value="Select One"/>
Field Office: <input style="width: 90%;" type="text" value="Select Option"/>	Topic: <input style="width: 90%;" type="text" value="Select One"/>
Subject: <input style="width: 90%;" type="text" value="Enter Keyword ..."/>	TA Recipient: <input style="width: 90%;" type="text" value="Enter Recipient ..."/>
Last Modified By: <input style="width: 90%;" type="text" value="Enter Name ..."/>	Recipient Organization Type: <input style="width: 90%;" type="text" value="Select One"/>
TA Provider: <input style="width: 90%;" type="text" value="Select One"/>	Appropriation: <input style="width: 90%;" type="text" value="Select One"/>

- 3 In the Search results, the user can sort the results by selecting the search results table headers. Select **<Search>** or **<Reset>** to restart the search.



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

User Role: Grantee and HUD Users **Menu Option:** Manage Requests

CPD Disaster Recovery Grant Reporting System
Z-21-TA-VA-0011

Manage Requests

Search Criteria Show Less Criteria

<p>Request ID: <input type="text" value="Enter HUD Request ID ..."/></p> <p>Field Office: <input type="text" value="Select Option"/></p> <p>Subject: <input type="text" value="Enter Keyword ..."/></p> <p>Last Approved By: <input type="text" value="Enter Name ..."/></p> <p>Organization State: <input type="text" value="Select Option"/></p> <p>Approved Date From: <input type="text" value="mm/dd/yyyy"/></p>	<p>Status: <input type="text" value="Select One"/></p> <p>Topic: <input type="text" value="Select One"/></p> <p>Organization Assisted: <input type="text" value="Enter Organization ..."/></p> <p>Organization Type: <input type="text" value="Select One"/></p> <p>TA Provider: <input type="text" value="Select One"/></p> <p>Approved Date To: <input type="text" value="mm/dd/yyyy"/></p>
---	---

[Reset](#) [Search](#)

Search Results 4520

[Copy](#) [Print](#) [CSV](#) [Excel](#)

Request ID	Subject	TA Provider	Organization 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 - Orlando/Orange, Osceola, Seminole Counties CoC	Jacksonville Field Office	08/27/2014	09/08/2014	Kevin Kissinger	Approved	🔗
997	Request for continuation/extension of HUD TA Assistance	Lorain, OH		Columbus Field Office	08/27/2014	11/05/2014	Lauren Deigh	Approved	🔗
993	Request for TA for TBRA subsidy calculation and monitoring		Columbus, OH	Columbus Field Office	08/26/2014	10/03/2014	Lauren Deigh	Approved	🔗
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	🔗

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
Topic	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.

User Role: Grantee and HUD Users	Menu Option: Manage Requests																																																																																																																								
Purpose: Allow Grantee and HUD Users to search and view existing Requests.																																																																																																																									
Complete the following steps to search existing Requests:																																																																																																																									
1 Follow the steps in Section B1 to search for a Technical Assistance Request.																																																																																																																									
2 In the “Search Results” section of the “Manage Requests” page, select the icon in the “Action” column to view or edit the desired Request.																																																																																																																									
<div style="border: 1px solid #ccc; padding: 10px;"> <p style="margin: 0;">Search Results 59</p> <p style="margin: 0;"> Copy Print CSV Excel </p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 10%;">Request ID</th> <th style="width: 20%;">Subject</th> <th style="width: 10%;">TA Provider</th> <th style="width: 15%;">Organization Assisted</th> <th style="width: 10%;">Field Office</th> <th style="width: 10%;">Request Submitted On</th> <th style="width: 10%;">Last Approved On</th> <th style="width: 10%;">Last Approved By</th> <th style="width: 10%;">Status</th> <th style="width: 5%;">Actions</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td>Approved</td><td></td></tr> </tbody> </table> <p style="margin: 0; text-align: right; font-size: small;"> « First « Previous 1 2 3 ... 6 Next » Last » </p> <p style="margin: 0; text-align: right; font-size: x-small;">Show 10 Rows ▾</p> </div>		Request ID	Subject	TA Provider	Organization Assisted	Field Office	Request Submitted On	Last Approved On	Last Approved By	Status	Actions									Approved										Approved										Approved										Approved										Approved										Approved										Approved										Approved										Approved										Approved										Approved	
Request ID	Subject	TA Provider	Organization Assisted	Field Office	Request Submitted On	Last Approved On	Last Approved By	Status	Actions																																																																																																																
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
								Approved																																																																																																																	
3 On the “Manage Request” page, users can view the following information in the header: HUD Request ID, Approved TA Type, Requestor, Approver, Request Submission Date, Approve Date, Status, and Subject. In addition, tabs across the page provide additional information for Details, Recipients, and Assignments.																																																																																																																									
<div style="border: 1px solid #ccc; padding: 10px;"> <p style="margin: 0;"> Manage Request Back</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;"> HUD Request ID: [redacted] Requestor: Jane Doe Request Submission Date: 12/21/2020 Status: ✔ Approved </td> <td style="width: 33%; border: none;"> Approved TA Type: TA - Admin Approver: John Smith Approve Date: 12/25/2022 Subject: [redacted] </td> <td style="width: 33%; border: none;"></td> </tr> </table> <p style="margin: 5px 0 0 0;"> Details Recipients Assignments </p> </div>		HUD Request ID: [redacted] Requestor: Jane Doe Request Submission Date: 12/21/2020 Status: ✔ Approved	Approved TA Type: TA - Admin Approver: John Smith Approve Date: 12/25/2022 Subject: [redacted]																																																																																																																						
HUD Request ID: [redacted] Requestor: Jane Doe Request Submission Date: 12/21/2020 Status: ✔ Approved	Approved TA Type: TA - Admin Approver: John Smith Approve Date: 12/25/2022 Subject: [redacted]																																																																																																																								
4 The following information is available on the Details tab: Requestor Details, Point of Contact, Request Topics, Problem Details, Decision Summary																																																																																																																									



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

User Role: Grantee and HUD Users Menu Option: Manage Requests

Details Recipients Assignments

Additional Details

Requestor Details Name: Jane Doe
Organization: ABC Associates
Email: requestor1@abc.com
Phone: 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 current policies and procedures and revise and strengthen them if possible to assure nahasda compliance.

Decision Summary Decision Summary - 1

5 The following information is available on the Recipients (Organizations Assisted) tab: Organization Background and Organizations Assisted.

Details Recipients Assignments

Organizations Assisted

Organization Background Consulted the local field office? [View Comments](#)

Organizations Assisted

Organization	Organization Type	Field Office	PHA Designation	Tribe Aware
	Continuum of Care			

The remainder of this page is intentionally left blank.



User Role: Grantee and HUD Users

Menu Option: Manage Requests

6 The Assignments tab displays the assignment to which the Request is associated, if assigned.

B3. HUD | Edit Request Status

User Role: HUD Users with Manage TA Assignments role

Menu Option: Manage Requests

Purpose: Allow HUD Users with the Manage TA Assignments role to edit the Request status.

Complete the following steps to edit an existing Technical Assistance Request:

- 1 Follow the steps in Section B1 to search for a Technical Assistance Request.
- 2 Authorized HUD Users with the Manage TA Assignments role will have an option to edit the Request Status by selecting the **<Edit>** link next to the Status field in the header. See Chapter 5 on User Management and Certification for more information on user roles.



User Role: HUD Users with Manage TA Assignments role	Menu Option: Manage Requests
<p>3 The “Update Request Status” page is displayed. The status can be updated to the following options: Approved, Assigned, Cancelled, Closed, In Progress, or On Hold.</p> <div data-bbox="269 447 1070 909" style="border: 1px solid black; padding: 10px;"><p>Update Request Status x</p><p>* Request Status: <input type="text" value="Approved"/></p><p>Comments:</p><p>Enter reason for updating the request status...</p><p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="Save"/></p></div>	

B4. HUD | Associate Existing Assignment to Request

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Requests
Purpose: Allow HUD Users with the Manage TA Assignments role to associate the request to an existing Technical Assistance Assignment.	
<p> Complete the following steps to associate an existing Technical Assistance Assignment to the Technical Assistance Request:</p>	
<p>1 Follow the steps in Section B1 to search for a Technical Assistance Request.</p> <p style="text-align: center;">The remainder of this page is intentionally left blank.</p>	



User Role: HUD Users with the Manage TA Assignments role

Menu Option: Manage Requests

- 2 Authorized HUD Users with the Manage Assignments role may associate the request to an existing TA Assignment by selecting the **<Associate Existing Assignment>** link on the Assignment tab.

The screenshot displays the 'Manage Request' interface. At the top, the system name 'Disaster Recovery Grant Reporting System' is visible. The request details include: HUD Request ID (redacted), Requestor: Jane Doe, Request Submission Date: 12/21/2020, Status: Approved, Approved TA Type: TA - Admin, Approver: John Smith, Approve Date: 12/25/2022, and Subject (redacted). Below the details are three tabs: 'Details', 'Recipients', and 'Assignments'. The 'Assignments' tab is selected and shows 'No Assignments found'. A red box highlights the 'Associate Existing Assignment' link.

- 3 The “Associate Assignment” page is displayed. Enter the search criteria to locate a TA Assignment. See “Associate Assignment Search Fields” table below for a description of each search field. After the desired fields are populated, choose **<Search>**.

The 'Associate Assignment' page has a search criteria section with the following fields: Assignment ID (text input: Enter Assignment ID...), Field Office (dropdown: Select One), Organization Assisted (text input: Enter Organization ...), and TA Type (dropdown: Select One). There are 'Reset' and 'Search' buttons at the bottom of the search area. A 'Cancel' and 'Save' button are located at the bottom right of the page.



User Role: HUD Users with the Manage TA Assignments role

Menu Option: Manage Requests

- 4 The search results will load. In the Search results, the user can sort the results by selecting the search results table headers. Users may also filter the search results by typing key words into the Search box above the search results table. Select **<Search>** or **<Reset>** to restart the search.

Associate Assignment ✕

Select an assignment you wish to associate with this Request

Search Criteria ▾

Assignment ID: Field Office:

Organization Assisted: TA Type:

Matching Results **98**

Search:

<input type="radio"/>	Assignment ID	Field Office	Organization Assisted	Approved TA Type	Last Modified On	Assignor
<input type="radio"/>	D-100040			TA - Web/Knowledge Mngmt	06/20/2021	
<input type="radio"/>	D-100040			TA - Web/Knowledge Mngmt	06/20/2021	
<input type="radio"/>	D-100040			TA - Web/Knowledge Mngmt	06/20/2021	
<input type="radio"/>	D-100040			TA - Web/Knowledge Mngmt	06/20/2021	
<input type="radio"/>	D-100040			TA - Web/Knowledge Mngmt	06/20/2021	

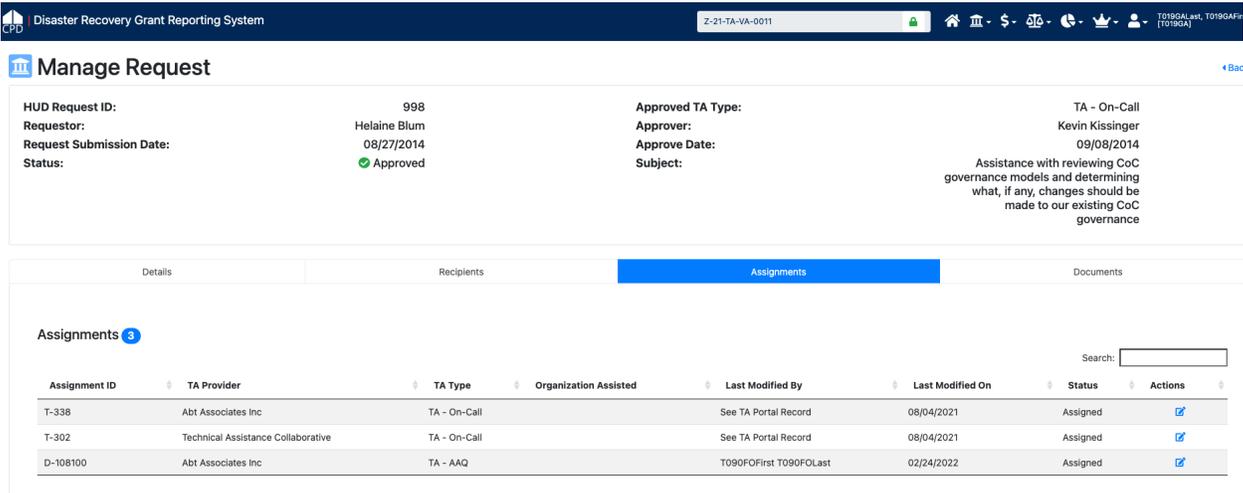
...

- 5 Once the desired TA Assignment has been located, select the radio button in the first column to select the assignment. Then, select **<Save>** to create the association between the TA Request and the selected TA Assignment.

The remainder of this page is intentionally left blank.



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

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Requests
<p>6 After selecting <Save>, the “Associate Assignment” page will close. The “Manage Request” page will be refreshed, and the selected TA Assignment will appear in a table on the Assignment tab.</p>	
<div style="background-color: #8B4513; color: white; padding: 10px; border-radius: 10px; margin-bottom: 10px;"> <p>TIP! A TA Request may only be associated with one assignment at a time. Therefore, the “Associate Existing Assignment” and “Add Assignment” links that were previously displayed will be hidden after an association is made.</p> </div>	
	

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.
TA Type	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: Manage Requests
Purpose: Allow HUD Users to delete an association between a TA Request and Technical Assistance Assignment.	
Complete the following steps to disassociate a Technical Assistance Assignment from a Technical Assistance Request:	

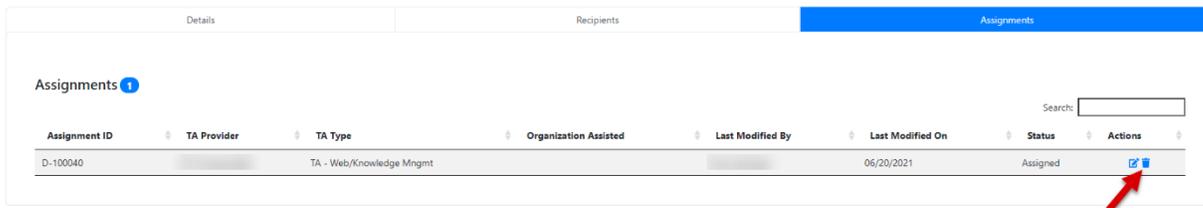


Chapter 9: Technical Assistance Requests and Assignments | Manage My Grants Module

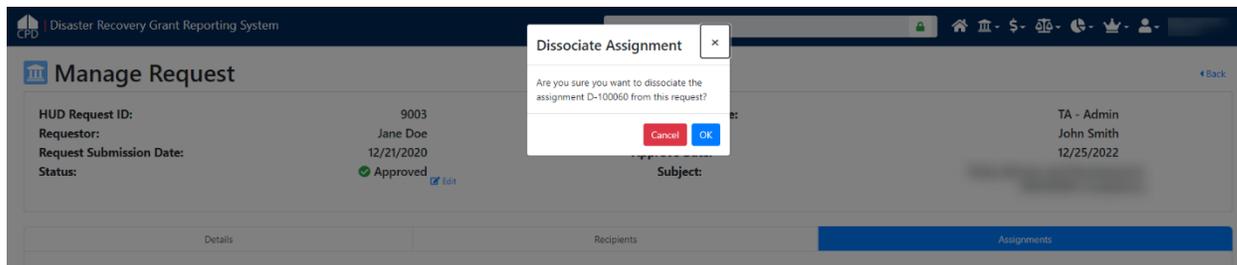
User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Requests
---	-------------------------------------

1 Follow the steps in Section B1 to search for a Technical Assistance Request.

2 Select the Assignments tab. The TA Assignment to which the TA Request is associated will be displayed in a table. Select the trash can icon () in the “Action” column to delete the desired association.



3 A confirmation dialog box will be displayed near the top of the “Manage Requests” page. Select **<OK>** to confirm the delete action. **NOTE:** The TA Assignment is not deleted; only the relationship between the TA Request and TA Assignment is removed with this action.



B6. HUD | Create Assignment from Request

User Role: HUD Users	Menu Option: 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.

Add Assignment

Details

HUD Request ID:

* TA Provider:

* Appropriation:

* TA Type (Activity Category):

* Assignment Summary:

File Edit View Insert Format Tools Table

B *I* U [List Icons] [Undo] [Redo] [Table] [Link]

* Assignment Scope:

File Edit View Insert Format Tools Table

B *I* U [List Icons] [Undo] [Redo] [Table] [Link]

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
- CC: Renewable Energy

B7. HUD | Add Supporting Documents to Request

User Role: HUD Users	Menu Option: Manage Requests
Purpose: Allow HUD Users to to add supporting documents to TA Request.	
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.

Disaster Recovery Grant Reporting System | Abt Associates Inc | C-20-TA-MD-0001

Manage Request

HUD Request ID: 998
Requestor: Helaine Blum
Request Submission Date: 08/27/2014
Status: Approved

Approved TA Type: TA - On-Call
Approver: Kevin Kissinger
Approve Date: 09/08/2014
Subject: 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 0
The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

No results found.

Supporting Links 0

No results found.

[Add Document](#)

3 Click on **Add Document** link to open the **Add Supporting Documents** window.

Add Supporting Documents

* Select Access Type: Private
 Public

* Select File to Upload: no file selected

Recipients | Assignments | **Documents**

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

[Add Document](#)

win

4 Users can specify **Access Type** (Public or Private) and select a file to upload. Clicking on **Save** will upload the document to this request.

5 Uploaded documents are displayed under **Supporting Documents** grid. Users can Delete, View, and Edit the documents and **Access Type** using the actions highlighted below.

Details | Recipients | Assignments | **Documents**

Supporting Documents 1
The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

Name	Date	Type	Access	Uploaded By Group	Uploaded By	Actions
Sample.pptx	03/02/2022	PPTX	Private	HUD Users	T015FOLast T015FOLast	Edit View Delete

Supporting Links 0

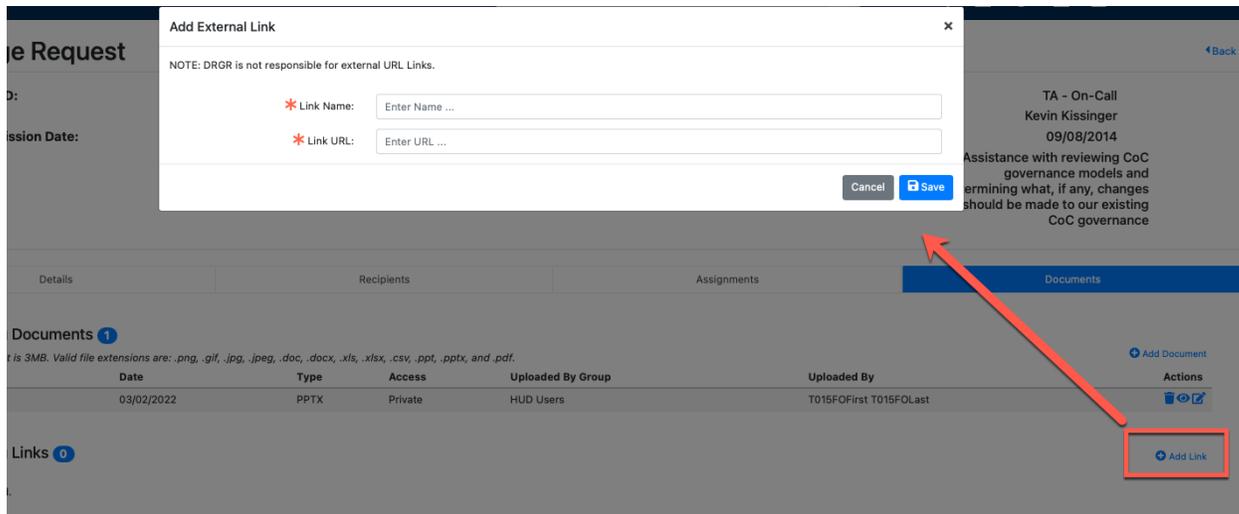
No results found.

[Add Document](#)

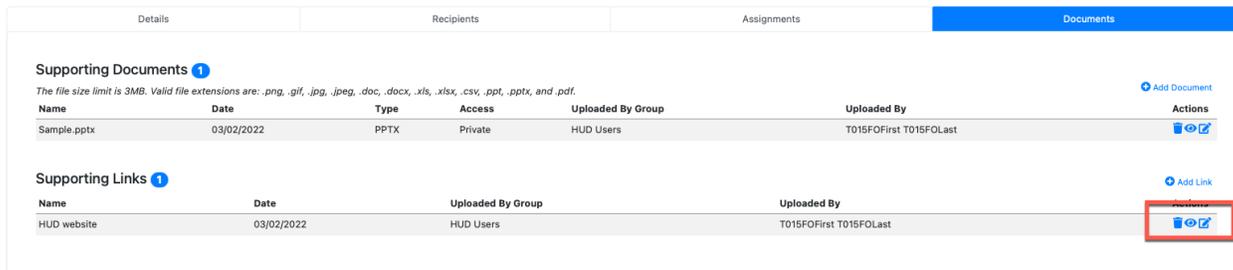
[Add Link](#)



- 6 Clicking on the **Add Link** action on the Documents tab opens **Add External Link** window which allows users to add external links to this request.



- 7 Any supporting links added to the Request are displayed under **Supporting Links** section of **Documents** tab. Users can Delete, View, and Edit these links using actions highlighted below.



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: Add Assignment
Purpose: Allow HUD Users to create a Technical Assistance Assignment.	
Complete the following steps to create a Technical Assistance Assignments:	
1 To create a TA Assignment, navigate to the Manage My Grants module and locate the Work Plans menu. Select the <Add Assignment> link. The “Add Assignment” page will load.	



The remainder of this page is intentionally left blank.

Add Assignment

Details

HUD Request ID:

* TA Provider:

* Appropriation:

* TA Type (Activity Category):

* Assignment Summary:

File Edit View Insert Format Tools Table

B *I* U [List Icons] [Undo] [Redo] [Table Icon] [Link Icon]

* Assignment Scope:

File Edit View Insert Format Tools Table

B *I* U [List Icons] [Undo] [Redo] [Table Icon] [Link Icon]

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
- CC: Renewable Energy



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

- 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.

CPD | Disaster Recovery Grant Reporting System

Manage Assignment Back Notify TA Provider

Assignment ID:	[Redacted]	Assigner:	[Redacted]
TA Type:	TA - Web/Knowledge Mngmt	Last Modified By:	[Redacted]
TA Provider:	[Redacted]	Last Modified Date:	06/20/2021
Status:	Assigned	Request Last Modified Date:	06/18/2021 Edit

Details Requests Organizations Work Plans

Additional Details

Assignment Summary	test mj 06202021	Edit
Assignment Scope	test	Edit
Appropriations	2018 Departmental	
Topics/HUD Programs		

HUD.GOV DRGR.BLA

- 3 On the “Manage Assignment” page, users can view the following information in the header: Assignment ID, Assigner, TA Type, Last Modified By, TA Provider, Last Modified Date, Status, and Request Last Modified Date. Following tabs are available on the page: Details, Recipients, and Assignments.

Manage Assignment Back Notify TA Provider

Assignment ID:	[Redacted]	Assigner:	[Redacted]
TA Type:	TA - Web/Knowledge Mngmt	Last Modified By:	[Redacted]
TA Provider:	[Redacted]	Last Modified Date:	06/20/2021
Status:	Assigned	Request Last Modified Date:	06/18/2021 Edit

Details Requests Organizations Work Plans



4 Following information is available on Details tab: Assignment Summary, Assignment Scope, Appropriations, and Topics/HUD Programs.

The screenshot shows the 'Details' tab of a technical assistance assignment. It features a navigation bar with 'Details', 'Requests', 'Organizations', and 'Work Plans'. The main content area is titled 'Additional Details' and contains four rows of information:

- Assignment Summary:** test mj 06202021
- Assignment Scope:** test
- Appropriations:** 2018 Departmental
- Topics/HUD Programs:** (empty)

Each row has an 'Edit' link on the right side.

5 A list of the requests that are associated with the TA Assignment is displayed on the Requests tab.

The screenshot shows the 'Requests' tab of a technical assistance assignment. It features a navigation bar with 'Details', 'Requests', 'Organizations', and 'Work Plans'. The main content area is titled 'Requests' and shows a table of 12 requests. The table has the following columns: HUD Request ID, Field Office, Organization Assisted, Submission Date, Approved Date, Subject, and Actions. There is an 'Associate Existing Requests' link in the top right corner.

6 The Organizations tab displays the organization groups and individual organizations that will benefit from the TA Assignment.

The screenshot shows the 'Organizations' tab of a technical assistance assignment. It features a navigation bar with 'Details', 'Requests', 'Organizations', and 'Work Plans'. The main content area is titled 'Organizations' and contains two sections:

- Organization Groups:** Davis-Bacon, Section 3
- Individual Organizations Assisted:** A table with columns: Organization Assisted, Program, Asst Sec Office, Office, Field Office, Region, State, DUNS, and Actions.

There is an 'Add Organizations' link in the bottom right corner.



7 A list of the Work Plans that are associated with the TA Assignment is displayed on the Work Plans tab.

Assignment Details

Element	Description
HUD Request ID	This element only appears when a Technical Assistance Assignment is created from an approved Technical Assistance 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.

User Role: TA Providers and HUD Users

Menu Option: Manage Assignments

Purpose: Allow Grantee Users associated with a TA Provider and HUD Users to search for existing TA Assignments.



Complete the following steps to search existing Technical Assistance Assignments:

- 1 To search for a TA Assignment, navigate to the **Manage My Grants** module, locate the Work Plans menu, and select the **<Manage Assignments>** link. The “Manage Assignments” page will load.

- 2 On the “Manage Assignments” page, enter search criteria to access the desired Assignment. See “Manage Assignments Search Fields” table below for description of search fields.

- 3 After desired fields are populated, choose **<Search>**. Search results will load.



User Role: TA Providers and HUD Users

Menu Option: Manage Assignments

Disaster Recovery Grant Reporting System

Manage Requests

Search Criteria [Show Less Criteria](#)

Request ID:	<input type="text" value="Enter HUD Request ID ..."/>	Status:	<input type="text" value="Select One"/>
Field Office:	<input type="text" value="Select Option"/>	Topic:	<input type="text" value="Select One"/>
Subject:	<input type="text" value="Enter Keyword ..."/>	Organization Assisted:	<input type="text" value="Enter Organization ..."/>
Last Approved By:	<input type="text" value="Enter Name ..."/>	Organization Type:	<input type="text" value="Select One"/>
Organization State:	<input type="text" value="Select Option"/>	TA Provider:	<input type="text" value="Select One"/>
Approved Date From:	<input type="text" value="mm/dd/yyyy"/>	Approved Date To:	<input type="text" value="mm/dd/yyyy"/>

Search Results **59**

Request ID	Subject	TA Provider	Organization Assisted	Field Office	Request Submitted On	Last Approved On	Last Approved By	Status	Actions
								Approved	
								Approved	
								Approved	
								Approved	
								Approved	
								Approved	
								Approved	
								Approved	
								Approved	

HUD.GOV DRGR R84

4 In the Search results, the user can sort the results by selecting the search results table headers. Select **<Search>** or **<Reset>** to restart the search.

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 identification number assigned to the Technical Assistance Assignment.
TA Provider	The TA Provider organization to which an assignment was given.
TA Type	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: Manage Assignments
Purpose: Allow Grantee Users associated with a TA Provider and HUD Users to view existing TA Assignments.	
<input checked="" type="checkbox"/> Complete the following steps to view existing Assignments:	
1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.	



User Role: Grantee and HUD Users	Menu Option: Manage Assignments
---	--

2 In the **“Search Results”** section of the **“Manage Assignments”** page, select the icon in the **“Action”** column to view or edit the desired Assignment.

Search Results 100

Copy
Print
CSV
Excel

Request ID	Assignment ID	TA Provider	TA Type	Organization Assisted	Requestor	Request Approver	Request Approval Date	Assignment Last Updated By	Assignment Last Modified On	Assignment Status	Notification Last Sent	Actions

First
Previous
1
2
3
Next
Last
Show 10 Rows

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: Manage Assignments
---	--

Purpose: Allow authorized HUD Users to delete a TA Assignment that is still in **“Drafted”** status.

Complete the following steps to delete a Technical Assistance Assignment:

- 1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.
- 2 In the **“Search Results”** section of the **“Manage Assignments”** page, select the trash can icon () in the **“Action”** column to delete the desired Assignment.

Search Results 100

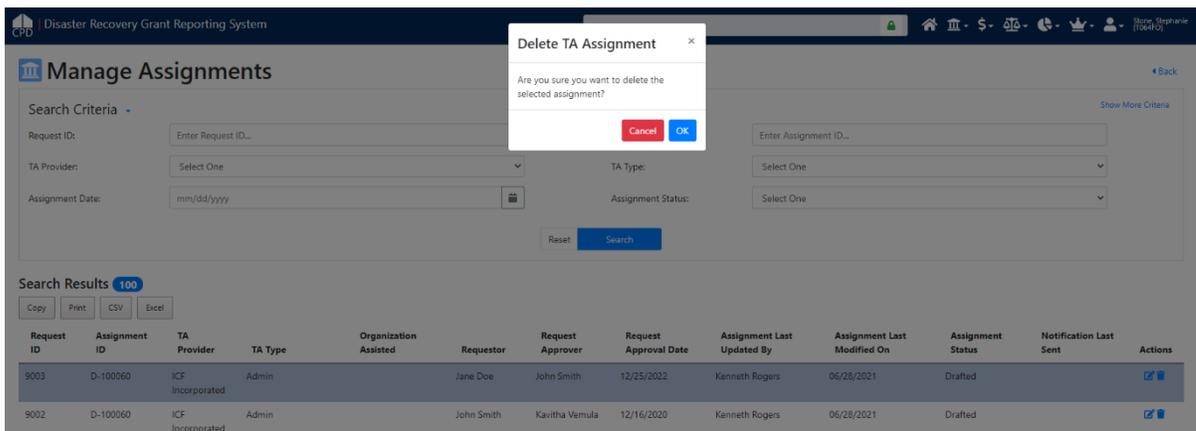
Copy
Print
CSV
Excel

Request ID	Assignment ID	TA Provider	TA Type	Organization Assisted	Requestor	Request Approver	Request Approval Date	Assignment Last Updated By	Assignment Last Modified On	Assignment Status	Notification Last Sent	Actions
										Drafted		
										Drafted		



User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Assignments
---	--

- A confirmation dialog box will be displayed near the top of the “Manage Assignments” page. Select <OK> to confirm the delete action.



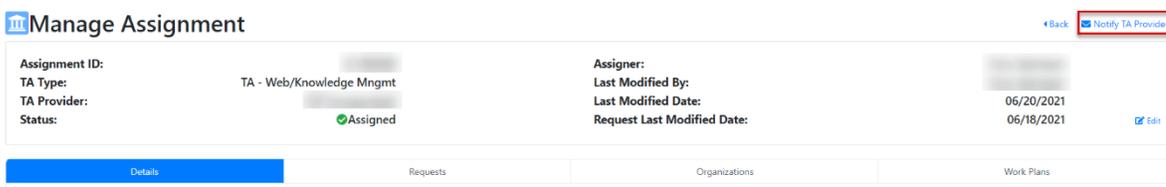
C5. HUD | Notify TA Providers of an Assignment

User Role: HUD Users with the Manage TA Assignments role	Menu Option: 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 TA Provider about a TA Assignment:

- Follow the steps in Section C2 to search for a Technical Assistance Assignment.
- To notify TA Providers about a TA Assignment, select the <Notify TA Provider> link above the header.





User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Assignments
<p>3 The “Create Email” page will be displayed. Update the recipients and email content as desired. Then, select <Send>. A notification will be sent to specified email recipients.</p>	

C6. HUD | Modify TA Assignment Status

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Assignments
Purpose: Allow HUD Users with the Manage TA Assignments to modify a TA Assignment’s status.	
Complete the following steps to modify a TA Assignment’s status:	
<p>1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.</p>	
<p>2 To edit the assignment details, select the “Edit” link in the header.</p>	



3 The “Edit Assignment” page will open.

Edit Assignment

Details

HUD Request ID:

* TA Provider:

* Appropriation:

* TA Type (Activity Category):

* Status:

* Assignment Summary:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

Assignment Summary

* Assignment Scope:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

Assignment Scope

Assignment Status Comments:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

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 Performance measure
- CPD-SN: Continuum of Care (CoC) Program
- CPD-SN: Emergency Solutions Grant Program (ESG)
- CPD-SN: Families Homeless



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

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Assignments
---	--

- 4 To modify the assignment status, select the desired status from the status field which is located between the TA Type (Activity Category) and Assignment Summary field.

* TA Type (Activity Category): Select One

* Status: Drafted

* Assignment Summary:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

Assignment Summary

- 5 If desired, enter a comment to explain the modification in the Assignment Status Comments field, which is located between the Assignment Scope and Topics/HUD Programs fields.

* Assignment Scope:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

Assignment Scope

Assignment Status Comments:

File Edit View Insert Format Tools Table

B I U [align icons] [list icons] [undo redo] [table link]

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

- 6 Verify a response is entered for each required field. Then, select **<Save>**. The TA Assignment will be updated.

C7. HUD | Edit TA Assignment Details

User Role: HUD Users with Manage TA Assignments	Menu Option: 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: 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 **<Edit>** link in the header. The "Edit Assignment" page (See Section C6, Step 3) will open.

Manage Assignment ← Back Notify TA Provider

Assignment ID:		Assigner:	
TA Type:	TA - Web/Knowledge Mngmt	Last Modified By:	
TA Provider:		Last Modified Date:	06/20/2021
Status:	✔ Assigned	Request Last Modified Date:	06/18/2021 Edit

Details Requests Organizations Work Plans

NOTE: The Assignment Summary and Assignment Scope can also be edited individually by selecting **<Edit>** link for each section.

Details Requests Organizations Work Plans

Additional Details

Assignment Summary	test mj 06202021	Edit
Assignment Scope	test	Edit
Appropriations	2018 Departmental	
Topics/HUD Programs		

- 3 Update the desired fields. Then, select **<Save>**. **NOTE:** If necessary, be sure to Notify TA Providers about changes in the Assignment by selecting the **<Notify TA Provider>** link in the secondary menu of the "Manage Assignment" page.

C8. HUD | Associate TA Requests with an Assignment

User Role: HUD Users with the Manage TA Assignments role

Menu Option: 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:

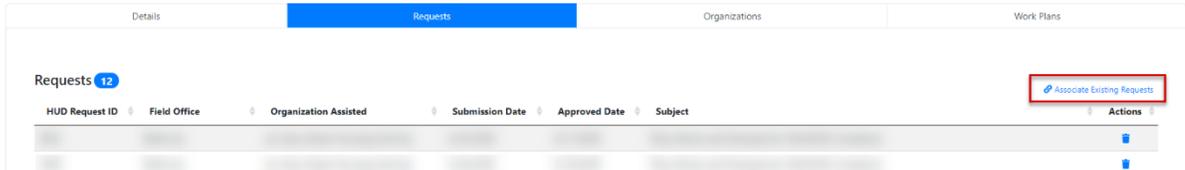
- 1 Follow the steps in Section C2 to search for and open the desired Technical Assistance Assignment.



User Role: HUD Users with the Manage TA Assignments role

Menu Option: Manage Assignments

- 2 Select the the Requests tab. A list of the requests that are currently associated with the TA Assignment is displayed. Select the **<Associate Existing Requests>** link above the Requests table.



- 3 The “Associate Requests” page will open. On the “Associate Requests” page, enter search criteria to access the desired Request. See “Associate Requests Search Fields” table below for description of search fields. After desired fields are populated, choose **<Search>**.

The remainder of this page is intentionally left blank.



User Role: HUD Users with the Manage TA Assignments role

Menu Option: Manage Assignments

- The search results will load. In the Search results, the user can sort the results by selecting the search results table headers. Users may also filter the search results by typing key words into the Search box above the search results table. Select **<Search>** or **<Reset>** to restart the search.

Associate Requests

Select the available Requests you wish to associate with this Assignment

Search Criteria ▾

Request ID: Field Office:

Organization Assisted: TA Type:

Matching Results 34

Search:

<input type="checkbox"/>	HUD Request ID	Field Office	Organization Assisted	Approved TA Type	Submission Date	Approved Date	Subject
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

- Once the desired TA Request(s) has been located, select the checkbox in the first column to select the request. Then, select **<Save>** to create the association between the TA Assignment and the selected TA Request(s). **NOTE:** If a request is already associated to a TA Assignment, the request will not be displayed in the search results.

- After selecting **<Save>**, the “Associate Requests” page will close. The “Manage Assignment” page will be refreshed, and the selected TA Request will appear in a table on the Requests tab.



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.
TA Type	Drop down of the type of TA that the assignment will provide.

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

User Role: HUD Users with the Manage TA Assignments role	Menu Option: Manage Assignments
Purpose: Allow HUD Users to delete an association between a TA Assignment and Technical Assistance Request.	
Complete the following steps to disassociate a Technical Assistance Assignment from a Technical Assistance Request:	
1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.	
2 Select the Requests tab. The TA Request(s) to which the TA Assignment is associated will be displayed in a table. Select the trash can icon () in the “Action” column to delete the desired association.	
3 A confirmation dialog box will be displayed near the top of the “Manage Requests” page. Select <OK> to confirm the delete action. NOTE: The TA Assignment is not deleted; only the relationship between the TA Request and TA Assignment is removed with 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.

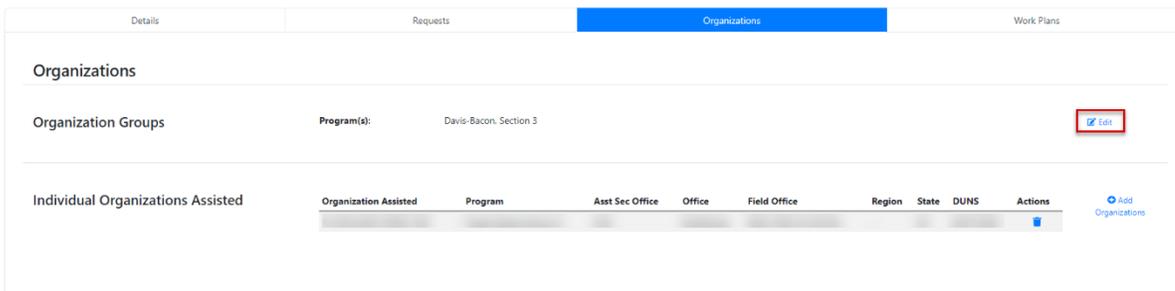


User Role: HUD Users with Manage TA Assignments	Menu Option: Manage Assignments
--	--

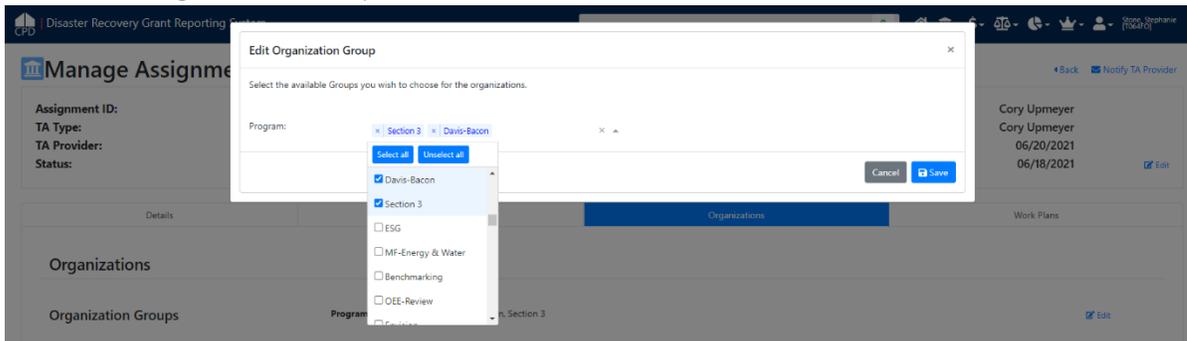
Purpose: Allow HUD Users to specify the organization groups to be assisted by a TA Assignment.

Complete the following steps to one or more organization groups to be assisted by a Technical Assistance Assignment:

- 1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.
- 2 Select the Organizations tab. The Organizations tab displays the organization groups and individual organizations that will benefit from the TA Assignment. Select **<Edit>** for the Organization Groups section.



- 3 The “Edit Organization Group” page will open near the top of the “Manage Assignment” page. Select one or more HUD Programs using the Program Field. Then, select **<Save>**. The selected groups will be listed in the Organization Groups section.



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: Manage Assignments
--	--

Purpose: Allow HUD Users to specify individual organizations to be assisted by a TA Assignment.



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

User Role: HUD Users with Manage TA Assignments

Menu Option: Manage Assignments



Complete the following steps to one or more organizations to be assisted by a Technical Assistance Assignment:

1 Follow the steps in Section C2 to search for a Technical Assistance Assignment.

2 Select the Organizations tab. The Organizations tab displays the organization groups and individual organizations that will benefit from the TA Assignment. Select the **<Add Organizations>** link for the Individual Organizations Assisted section.

Organization Assisted	Program	Asst Sec Office	Office	Field Office	Region	State	DUNS	Actions
								Add Organizations

3 The “Add Recipients” page will open. On the “Associate Recipients” page, enter search criteria to locate the desired Organization(s). See “Organizations Assisted Search Fields” table below for description of search fields. After desired fields are populated, choose **<Search>**.

Add Recipients ✕

Select the available Organizations you wish to associate with this Assignment

Search Criteria ▾

Organization Assisted:	<input type="text" value="Enter ..."/>	Program:	<input type="text" value="Enter ..."/>
Field Office:	<input type="text" value="Enter ..."/>	Office:	<input type="text" value="Enter ..."/>
Region:	<input type="text" value="Enter ..."/>	Asst Sec Office:	<input type="text" value="Enter ..."/>
DUNS Number:	<input type="text" value="Enter ..."/>	Unique Entity Identifier:	<input type="text" value="Enter ..."/>



User Role: HUD Users with Manage TA Assignments

Menu Option: Manage Assignments

- The search results will load. In the Search results, the user can sort the results by selecting the search results table headers. Users may also filter the search results by typing key words into the Search box above the search results table. Select **<Search>** or **<Reset>** to restart the search.

Add Recipients
✕

Select the available Organizations you wish to associate with this Assignment

Search Criteria ▾

Organization Assisted: <input style="width: 90%;" type="text" value="Enter ..."/>	Program: <input style="width: 90%;" type="text" value="Enter ..."/>
Field Office: <input style="width: 90%;" type="text" value="Enter ..."/>	Office: <input style="width: 90%;" type="text" value="Enter ..."/>
Region: <input style="width: 90%;" type="text" value="Enter ..."/>	Asst Sec Office: <input style="width: 90%;" type="text" value="Enter ..."/>
DUNS Number: <input style="width: 90%;" type="text" value="Enter ..."/>	Unique Entity Identifier: <input style="width: 90%;" type="text" value="Enter ..."/>

Matching Results 50220

Search:

<input type="checkbox"/>	Organization Assisted	Program	Asst Sec Office	Office	Field Office	Region	State	DUNS	UEI
<input type="checkbox"/>	[REDACTED]	Project Based Section 8	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Project Based Section 8	HSG	Multifamily	CALIFORNIA STATE OFF	-	CA	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Section 811	HSG	Multifamily	NEW YORK SO (NYSO)	-	NJ	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Section 811	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Project Based Section 8	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Project Based Section 8	HSG	Multifamily	NEW YORK SO (NYSO)	-	NY	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Project Based Section 8	HSG	Multifamily	GEORGIA STATE OFFICE	-	TN	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Project Based	HSG	Multifamily	CALIFORNIA	-	CA	[REDACTED]	[REDACTED]

- Once the desired organization(s) has been located, select the checkbox in the first column to select the organization(s). Then, select **<Save>** to add the organization to the list of individual organizations that will be assisted.



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

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

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 technical 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

User Role: HUD Users	Menu Option: Manage Assignments
Purpose: Allow HUD Users to add supporting documents to TA Assignment.	
<p>1 Follow the steps in Section C2 to search for a Technical Assistance Assignments.</p>	
<p>2 Authorized HUD users can click on Documents tab to add supporting documents.</p>	



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

Disaster Recovery Grant Reporting System | Abt Associates Inc | C-20-TA-MD-0001

Manage Assignment

Assignment ID: T-338
TA Type: TA - On-Call
TA Provider: Abt Associates Inc
Status: Assigned

Assigner: See TA Portal Record
Last Modified By: See TA Portal Record
Last Modified Date: 08/04/2021
Request Last Modified Date: 07/24/2021

Details | Requests | Organizations | Work Plans | **Documents**

Supporting Documents 0
The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

No results found.

Supporting Links 0
No results found.

[Add Document](#)

- 3 Click on **Add Document** link to open the **Add Supporting Documents** window.

win

- 4 Users can specify **Access Type** (Public or Private) and select a file to upload. Clicking on **Save** will upload the document to this assignment.

- 5 Uploaded documents are displayed under **Supporting Documents** grid. Users can Delete, View, and Edit the documents and **Access Type** using the actions highlighted below.

Details | Requests | Organizations | Work Plans | **Documents**

Supporting Documents 1
The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

Name	Date	Type	Access	Uploaded By Group	Uploaded By	Actions
Sample.pptx	03/02/2022	PPTX	Private	HUD Users	T015F0First T015F0Last	Delete View Edit

Supporting Links 0
No results found.

[Add Document](#)

[Add Link](#)

- 6 Clicking on the **Add Link** action on the Documents tab opens **Add External Link** window which allows users to add external links to this assignment.



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

ing System

Abt Associates Inc | C-20-TA-MD-0001

T015FOLast, T015FOFirst (T015FO)

ent

NOTE: DRGR is not responsible for external URL Links.

* Link Name: Enter Name ...

* Link URL: Enter URL ...

Cancel Save

Requests Organizations Work Plans Documents

Back Download Notify TA Provider

See TA Portal Record
See TA Portal Record
08/04/2021
07/24/2021 Edit

Uploads are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

Date	Type	Access	Uploaded By Group	Uploaded By	Actions
03/02/2022	PPTX	Private	HUD Users	T015FOFirst T015FOLast	

Add Document

Add Link

- 7 Any supporting links added to the Request are displayed under **Supporting Links** section of **Documents** tab. Users can Delete, View, and Edit these links using actions highlighted below.

Details Requests Organizations Work Plans Documents

Supporting Documents 1

The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

Name	Date	Type	Access	Uploaded By Group	Uploaded By	Actions
Sample.pptx	03/02/2022	PPTX	Private	HUD Users	T015FOFirst T015FOLast	

Supporting Links 1

Name	Date	Uploaded By Group	Uploaded By	Actions
HUD website	03/02/2022	HUD Users	T015FOFirst T015FOLast	

Add Document

Add Link