QUICK REFERENCE: USING DRGR AND TA PORTAL TO MANAGE TA AWARDS

HUD requires the use of its Disaster Recovery Grant Reporting ("DRGR") System and its TA Portal on the HUD Exchange to manage its Technical Assistance (TA) awards. Use the steps below as a quick reference for managing the following activities:

The steps below are detailed within both the TA Portal and the DRGR user guides, available on: https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance. Please know that within this document and elsewhere, the terms "you" and "grantee" and "awardee" and "TA provider" are used interchangeably. Similarly, the term "grant" is used in the same context as "award."

1. Create a TA Portal User Account and DRGR User Account

A DRGR user account and a TA Portal user account are required for each TA Provider staff person (including managers and subcontractors) responsible for completing and submitting work plans, invoices, and vouchers to HUD, as well as reporting progress on TA tasks.

Use these quick steps to create a TA Portal account and a separate account in DRGR. If you already have access to the TA Portal and the DRGR system, skip to page 3 below.

OBTAIN A NEW TA PORTAL ACCOUNT		
Step	**Instruction**	**Description**
1.	Go to https://www.hudexchange.info/onecpd-portal	
2.	Click on the **Create an Account** link and complete all mandatory fields.	
3.	Receive e-mail with your user ID and temporary password.	This may take a few days to receive.
4.	Send an e-mail to the TA Portal Administrator within your organization, or e-mail dan.hegner@icfi.com. Include with your e-mail your user ID and your role as it relates to TA work plans and progress reports (view only or submit work plans/reports).	This allows ICF and HUD to assign you the appropriate user roles.
5.	Use the new user ID, password, and log instructions to log in to TA Portal at https://www.hudexchange.info/onecpd-portal.	Enter into the TA Portal all Direct TA (except AAQ), Needs Assessment, Group Learning, and Tools/Products work plan category types along with progress reports/notes. See quick steps below or full instructions in the TA Portal Guide.
E-mail dan.hegner@icf.com with any technical questions related to the TA Portal. All other questions should be sent to your GTR.		

OBTAIN A NEW DRGR USER ACCOUNT		
Step	**Instruction**	**Description**
1.	An existing Grantee Admin user must log into DRGR.	DRGR URL: https://drgr.hud.gov/DRGRWeb
2.	Read the disclaimer then click **I Accept** button. Then, click on **ADMINISTRATION** in the blue navigation bar.	
3.	Click on **Request New User** from left-side navigation menu.	If the link is unable, you do not have user request privileges. Contact another Grantee Admin user or your GTR.
4.	Select **Yes** or **No/Unknown/Unable to find**, in response to the IDIS question on the screen.	In most cases, select **No/Unknown/Unable to find**.
5.	Select **Continue to Next Page** button.	
6.	Complete all mandatory fields.	• Full name of new user • Title • Email address • A self-designate five digit PIN • State • Phone number with extension
7.	Identify the appropriate roles of the user, under the **Grantee Profile** section of the page.	Basic DRGR roles include grantee administrator, regular users, and view only users. Additional privileges: view staff rates, submit action plans/work plans, submit user requests, and draw roles may be assigned to either request draws or approve draws (not both). **Please note: contractors are not allowed to serve in the Grantee Admin or draw approver roles.**
8.	Within the **Comments** field, enter any notes about the request that HUD needs to consider when approving the request.	
9.	Click the **Save** button.	The request is submitted in DRGR, and an email notification is sent by DRGR to the HUD DRGR Managers.
10.	After the request is approved, DRGR_Help@hud.gov will send e-mail notification with instructions on next steps.	The e-mail will include a user ID, default password, and certification instructions.
TA Providers should use the Ask-a-Question link at www.hudexchange.info/ask-a-question for all questions related to DRGR.		

2. Authorize Users to Access Award Data in DRGR

A Grantee Administrator within your organization must assign user to one or more grants/awards or remove users. Here are the quick steps that apply.

CERTIFY NEW OR EXISTING DRGR USERS		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
2.	Log in to DRGR with your B ID and password.	
3.	Read the disclaimer then click **I Accept** button.	
4.	Click on **ADMINISTRATION** in the blue navigation bar.	
5.	Click on **Associate User to Grants** on the left side panel.	

6.	Look for and highlight new users to assign to the grant in the right window with the title **Available Users**.	One or more users can be highlighted.
7.	Click the **Assign** button.	
8.	Click the **Save Changes** button.	
9.	Repeat steps 6 – 8 for each other users that need to be added or removed from an award.	
10.	Click **Log out** on the left side panel.	

3. Certify DRGR Users

All DRGR user accounts require an initial certification by HUD, and require certification once every 6 months (end of June and end of December). The DRGR system administrator(s) for your organization are re-certified by HUD. All other DRGR users within your organization are certified by the system administrator(s). Here are the steps for a system administrator to certify other DRGR users.

CERTIFY NEW OR EXISTING DRGR USERS		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
2.	Log in to DRGR with your B ID and password.	
3.	Read the disclaimer then click **I Accept** button.	
4.	Click on **ADMINISTRATION** in the blue navigation.	
5.	Click on **Certify Grantee Users** on the left side panel.	
6.	Look for the user's ID and name in the bottom box. Highlight the user's name and click on **Activate User** to get them top right.	
7.	Highlight the user's name (if it isn't already) in the top right box, and click the **Certify** button.	
8.	Click **Save Changes**.	
9.	Repeat steps 4 – 6 for each user that requires certification.	
10.	Click **Log out** on the left side panel.	

4. Submit Staff Types/Categories, Rates, and Staff Assigned To Work

HUD must approve the rate for any person who will charge labor costs directly to the award. Rates are to be submitted using the following instructions. The same instructions apply for approved rates that are no longer being charged to the award and need to be deactivated.

ADD STAFF TYPES		
Step	**Instruction**	**Description**
1.	Complete the *Rates over $200* spreadsheet, for all total rates over $200.	See worksheet on sakai, within the following folder: Community Compass TA HUB Resources / TA Regulations/Admin Policies / Notices/Guidance
2.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
3.	Log in to DRGR with your B ID and password.	
4.	Read the disclaimer then click **I Accept** button.	
5.	Click on **ADMINISTRATION** in the blue navigation.	
6.	Select the **Manage Staff Types** menu option.	
7.	Click the **Add Staff Type** button to *add* a rate.	

	To *edit* an existing rate, use the **search criteria** to search for the existing rate. Then, use the **Edit** link under the Action column, to edit that existing rate.	
8.	On the **Add Staff Types** screen or the **Edit Staff Types** screen, enter in data in the fields shown, for the rate requiring HUD approval: Staff Type: <text> Effective Date: <mm/dd/yyyy> Rate Type: <dropdown menu> Occupation Type: <dropdown menu> Base Rate/Hour ($): <dollar amount> Fringe Rate ($): <dollar amount> Overhead Rate ($): <dollar amount> General & Admin Rate ($): <dollar amount> Total Rate per Hour ($): <dollar amount>	See guidance on sakai, within the following folder: Community Compass TA HUB Resources / TA Regulations/Admin Policies / Notices/Guidance
9.	From the **Status** field, select Pending Approval from the drop down menu.	
10.	Select the **Add Additional Document** link to add supporting documents, including the *Rates over $200* worksheet.	
11.	Click the **Save** button to save submit the rate in the system. Click the **Cancel** button to cancel submission in the system.	

ADD STAFF TO APPROVED RATES IN DRGR		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
2.	Log in to DRGR with your B ID and password.	
3.	Read the disclaimer then click **I Accept** button.	
4.	Click **ADMINISTRATION** in the blue navigation.	
5.	Click **Manage TA Staff** on the left side panel.	
6.	Click the **Add Staff** button.	
7.	Enter in data for the following fields: Is staff a current DRGR user: <select No> Select User: <dropdown menu> First Name: <text> Middle Initial: <text> Last Name: <text> Title: <text> Organization: <dropdown menu> Staff Type: <dropdown menu and will be displayed as: Rate Type-Staff Type; only HUD approved staff types appear> Status: <select 'Active' from the dropdown menu; select inactive to deactivate a staff person>	
8.	Click the **Save** button. (Click the **Cancel** button to remove the values.)	
9.	Repeat steps 6 – 8 for each staff person.	
10.	Click **Log out** on the left side panel.	

5. View Projects in DRGR

Use DRGR Projects to see the funding sources associated with the award/grant in DRGR. These projects will be connected to work plans (see section 6 on the following page).

<table>
<tr><th colspan="5">PROJECTS IN DRGR</th></tr>
<tr><th>Step</th><th colspan="3">Instruction</th><th>Description</th></tr>
<tr><td>1.</td><td colspan="3">Open an Internet browser and access the DRGR site.</td><td>Or click here: https://drgr.hud.gov/DRGRWeb</td></tr>
<tr><td>2.</td><td colspan="3">Log in to DRGR with your B ID and password.</td><td></td></tr>
<tr><td>3.</td><td colspan="3">Read the disclaimer then click I Accept button.</td><td></td></tr>
<tr><td>4.</td><td colspan="3">Lock in the grant number in the Grant Number field at the top of the screen.</td><td></td></tr>
<tr><td>5.</td><td colspan="3">Click GRANT MANAGEMENT in the blue navigation.</td><td></td></tr>
<tr><td>6.</td><td colspan="3">Click Search/Edit Project on the left side panel.</td><td></td></tr>
<tr><td>7.</td><td colspan="3">Select the TA award number from the Grant # dropdown.</td><td></td></tr>
<tr><td>8.</td><td colspan="3">Click Search button.</td><td></td></tr>
<tr><td>9.</td><td colspan="3">Click View under the Action column. Only TA providers with award prior to FY14 can use the Edit button</td><td></td></tr>
<tr><td rowspan="5">10.</td><td colspan="3">Projects were setup by HUD as follows:</td><td>No changes can be made without HUD approval.</td></tr>
<tr><td>Project #</td><td>Project Title</td><td>Project Description</td><td>Project Budget Amount</td></tr>
<tr><td>1</td><td>Administration</td><td></td><td>10% of award ($1M +); or 15% (less than $1M awards, or as approved CAO)</td></tr>
<tr><td>2</td><td>Coordination</td><td></td><td>5% of award (more or less as approved by CAO)</td></tr>
<tr><td>3</td><td>Funding Sources (from HUD-1044)</td><td></td><td>$ minus Admin and Coordination</td></tr>
<tr><td>11.</td><td colspan="3">Repeat steps 5-9 for each project.</td><td></td></tr>
<tr><td>12.</td><td colspan="3">Click Log out on the left side panel.</td><td></td></tr>
</table>

6. Add Work Plans To DRGR

Work plans are submitted by TA providers in response to TA assignments from HUD. Work plans outline the specific plans to addressed needs and capacity gaps of HUD grantees. All work plans are required to be approved by HUD in its DRGR before TA activities can begin. And TA providers can incur costs for activities included in HUD-approved work plans; HUD will not pay for costs for activities not included within the approved work plans.

Use the steps below to setup your work plans in DRGR. The information in DRGR should mirror the work plan information in the TA Portal, for Direct TA, On-Call TA, Product Development, Training Delivery, and Needs Assessment work plans.

ADD A WORK PLAN IN DRGR		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
2.	Log in to DRGR with your B ID and password.	
3.	Read the disclaimer then click **I Accept** button.	
4.	Lock in the grant number in the **Grant Number** field at the top of the screen.	
5.	Click **GRANT MANAGEMENT** in the blue navigation.	
6.	Click on **Add TA WorkPlan** on the left side panel.	
7.	Fill out the following fields as follows:	
	Select an Award # from the **Grant #** dropdown menu. Select a Workplan Type from the **Workplan Type** dropdown menu. **Invoice Period** dropdown menu defaults to Monthly. Enter a Workplan # in the **Workplan #** field. **Workplan Status** dropdown menu defaults to Open. You will change the status at a later step.	Work plan numbers in DRGR must the work plans numbers in the Portal and in your financial management system. Use the following key when creating work plan numbers: - First three-four letters of the provider's organization name or acronym i.e., AAHA, TDA, etc.) - One letter for funding source: A = HOME B = CDBG C =Core Curricula F = AFFH TA (FAIR HOUSING) G = MAHRA/Housing H = HMIS/NDAP M = McKinney/HOMELESS N =ONAP/NAHASDA O =OneCPD/Community Compass/Departmental P = PHA TA R = Distressed Cities S = TA PROJECT SUPPORT T = NSP W = HOPWA Y = Youth Homelessness - Two digits for cooperative agreement year (ex. 11 = 2011) - At least three digits for consecutive work plan numbering (001, 002, 003, etc.) - identify the work plan by short name *For example, TDA-O-10-002 (Coord) would be the first work plan submitted by TDA to HUD under the 2010 OneCPD grant, and is for coordination.*

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8.	Under the **Scope** field, enter a description of the scope or enter 'refer to TA Portal' if applicable.	See standards with Attachment 2 of the cooperative agreement provisions.
9.	Use the **TA Grantee Assisted** fields to identify all organizations receiving assistance via the work plan.	Work plans must reflect the name(s) of organization(s) to be assisted. If the organization(s) are not known at the on set of the work plan, indicate such within the Scope field. And remember to add the assisted organization(s) assisted before closing the work plan.
10.	Under **the Period of Performance** section, fill in the following fields: From: <mm/dd/yyyy> To: <mm/dd/yyyy>	See standards with Attachment 2 of the cooperative agreement provisions.
11.	Under the **Tasks** section, fill in the following fields: Task **<User Selected>** Start Date **<User Selected>** End Date **<User Selected>** Estimate Hours **<User Selected>** Estimated Costs **<User Selected>** Narrative **<User Selected>**	See standards with Attachment 2 of the cooperative agreement provisions.
12.	Under **Milestones** section, fill in the following fields: Milestone:__________________ Expected Date:______________	See standards with Attachment 2 of the cooperative agreement provisions.
13.	Click **Save** button.	The message '**TA Workplan Created Successfully**' appears at the top of screen.
14.	On the **TA Manage TA Workplan Activity** page, click the **Add Activity Details** button.	
15.	Select a project # from the **Project # / Project Title** drop down menu.	Selection refers to funding sources/projects from HUD-1044.
16.	Enter a dollar amount in the **Proposed Staff Budget** Field.	**NOTE: Proposed Staff Budget** should be entered; can be left at zero
17.	Under the **Proposed Staff** section fill in the following fields: Select a **Staff Type** from the **Staff Type/Effective Date** dropdown menu Select a staff name from the **Staff** drop down Enter in a date in the **From** and **To** fields enter Enter the number of hours in the **Hours** field.	* Please note only approved staff will be displayed, if staff has not been approved the staff section will not display.
18.	Under the section for **Other/BLI Costs**, select a BLI from the **BLI** dropdown menu.	
19.	Fill in the following fields: Enter a date in the **From** field <mm/dd/yyyy> Enter date in the **To** field <mm/dd/yyyy> Enter text in the **Description** field: Enter a dollar amount in the **Total** field.	See standards with Attachment 2 of the cooperative agreement provisions.
20.	Click the **Add Additional Documents** link under the supporting documents section.	

21.	Click **Browse button**, highlight a document to upload, select a Document and Click Open.	
22.	Click **Save**. **Note**: Validation Rules done at save. Proposed Staff Budget + Total Other/BLI Costs must be <= Total Budget Total Proposed Staff must be <= Proposed Staff Budget	
23.	Click **Save and Return to TA WorkPlan button** to exit the page.	The **TA - Edit TA Work Plan** page is displayed.
Submit work plan to HUD		
24.	Under the **WorkPlan Status** field, Select the "Submitted" status.	
25.	Click the **Save** button.	
26.	Send an e-mail to the assigned HUD GTM and GTR, and other interest parties. (Click the **Cancel** button to continue without sending emails.)	
27.	Search for the work plan created, and click on the PDF link under the Action column. Send the PDF to the assigned HUD GTM and GTR.	Be sure to include any work plan attachments in your email.
28.	Click **Log out** on the left side panel.	

7. Add Work Plans To TA Portal

Simultaneous to entering the work plan in the DRGR, certain work plans are required to be entered into the TA Portal. The certain work plans include direct TA, On-Call TA, Product Development, Training Delivery, and Needs Assessment work plans. Duplicate entry is limited as much as possible. The information entered into DRGR is primarily financial in nature, while the information entered into Portal focuses more on the actual work/tasks to be undertaken. Use the steps below to setup your work plans in the TA Portal.

ADD A WORK PLAN IN TA PORTAL		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the TA Portal.	Or click here: https://www.hudexchange.info/onecpd-portal
2.	Log in to the TA Portal with your user ID and password.	
3.	Click the **Work Plan** link.	
4.	Click on the button associated with type of work plan that needs to be create.	
5.	Add the following fields: Enter Work Plan Name Enter Work Plan # Enter Funding Source Enter Cooperative Agreement # Enter Period of Performance	The naming convention for work plans is {Grantee/Assisted Organization}-{TA Type}-{Phase/POP-optional open text field}: Work plan numbers in the TA Portal must match DRGR and your financial management system. Use the following key when creating work plan numbers: - First three-four letters of the provider's organization name or acronym i.e., AAHA, TDA, etc.) - One letter for funding source:

		P = PHA TA O =OneCPD/Community Compass/Departmental N =ONAP/NAHASDA C =Core Curricula H = HMIS/NDAP A = HOME M = McKinney/HOMELESS W = HOPWA B = CDBG F = AFFH TA (FAIR HOUSING) S = TA PROJECT SUPPORT T = NSP G = MAHRA/Housing Y = Youth Homelessness - Two digits for cooperative agreement year (ex. 11 = 2011) - At least three digits for consecutive work plan numbering (001, 002, 003, etc.) - identify the work plan by short name *For example, TDA-O-10-002 (Coord) would be the first work plan submitted by TDA to HUD under the 2010 OneCPD grant, and is for coordination.*
6.	Select the Organization Type, State, Organization, and Field office from the dropdown boxes.	
7.	Enter Assignment background	Some examples: - *Assignment made via email or discussion with GTM* < Enter the assignment detail that was provided in the email assignment or a summary of the conversation with the provider's GTR/GTM or another TAD representative.> - *Work Plan for Second Funding Source* < If this is the second funding source for an assignment, enter that information in the background. This information will be on the "Assignment Information" tab in place of the "decision summary.">
8.	Add relevant documents	Examples of information you may want to attach: grantee performance assessment; or the email containing information about the assignment.
9.	Click on the **Work Plan Scope** tab and click **Edit** next to TA Project and Activity Scope.	
10.	Enter the TA Project and Activity Scope -- include a summary of the work to be performed, the needs that work will address, and the expected Outcomes of the work. **The team lead for the assignment should be named in the project and activity scope.**	
11.	Click the **Save** button.	
12.	Click **Edit** next to Strategic Goals. Check all of the HUD Strategic goals and the Homelessness Goals that the work plan supports.	

13.	Click the **Save** button.	
14.	Click **Edit** next to Expected Outcomes. - Enter the Title for the Outcome - Enter the description of the outcome in the box provided. Note that TA Providers will be required to report on any outcomes that are entered. - Click on the **Save** button. - Click **Add Outcome** to add additional expected outcomes.	Use outcome guidance at https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance
15.	Click on the **Tasks** tab and click **Add New Task** button.	
16.	For each task enter the following information: - **Task Name --** number the tasks in consecutive order and give each task a descriptive name. - **Task Description --** summarize the reason to perform the task and the steps that it will take to perform the task. Include the Key Personnel in the task descriptions. - **Topics --** identify the topics that the task is related to. These might include programs, systems, crosscutting requirements, or program management topics. Check all that apply. This will determine which Program Office HUD Members are notified of work plan submission for review. - **Period of Performance** -- enter the period of performance for the specific task. - **Estimated Task Budget** -- insert the estimated budget for each task based on the level of effort, staff assigned and other direct costs, such as travel. The TA Portal will add up the total for the tasks must equal budget from each task to determine the total work plan budget. This must match the financial information entered into DRGR. - **Outputs** -- enter the appropriate outputs for the specific task. - **Labor Categories and Estimated Hours** -- Input the labor categories and the number of estimated hours to be devoted to the task by labor category. To add more labor categories, click on "Add New." Labor categories should match staff types in DRGR.	Outputs, especially on tools and products work plans, see guidance at: https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance
17.	Click the **Save** button.	
18.	After a task is entered; output(s) must be entered. Click on the **view/edit** button under task output.	You must state at least one output for each task, and the expected completion date.
19.	Add out detail, include the following information: - Output Title - Estimated Completion Date - Description - Click the **Save** button.	- Policies, procedures, tools developed - Organizational or staffing assessment conducted - Community meetings conducted - Partnerships created - Data analyzed and reported

	- Click **Add Output** to add additional outputs for the same task.	- Training materials developed - Persons trained - Website hits - Number of web downloads - Written products developed - Web tools developed
20.	Click on the **People** tab and click **Edit GTM/GTR** button.	
21.	Click the GTR and GTM from the drop down menu.	
22.	Click **Update HUD Reviewers** after the GTM and GTR have been selected. Click **Add/Remove TA Team Members** from the People Tab.	The Team Lead should also be entered on the **People** tab, along with other team members that will need to view and edit the work plan.
23.	Click the TA Team member from the dropdown list.	If a team member is not listed, ensure that the team member has a OneCPD.info account and has been give access to the TA Work Plan module.
24.	Click **Update Team Members** when all team members have been added.	
25.	Click **Add Another** to add multiple team members.	
26.	Click **Submit Work Plan to HUD** in the upper right hand corner of the work plan module.	The individuals with the TA Provider – Manager role are the only individuals that may submit work plans.
27.	On the Submit Work Plan to HUD screen, the submission date is populated in the Date Occurred field.	
28.	Click **Submit Work Plan**.	After the work plan is submitted, the status will change to “In Review GTM since XX/XX/XXX.”
29.	Log out of the TA Portal.	

8. Create and Submit a Voucher in DRGR

After a work plan is set up and approved by HUD, TA award recipients can use the Drawdown module in DRGR to create and submit vouchers (e.g., request for reimbursement of eligible costs) against approved work plan budgets. TA award recipients are required to submit a voucher at least once per month, and using DRGR. HUD's financial control standards require two persons to create and submit vouchers for HUD approval. One person must create the voucher, and another person must confirm and approve the voucher for submission to HUD. Use the steps below to create and submit vouchers in DRGR.

ADD A VOUCHERS IN DRGR		
13 steps below to be complete by TA providers with Draw Request role.		
Step	**Instruction**	**Description**
1.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
2.	Log in to DRGR with your B ID and password.	
3.	Read the disclaimer then click **I Accept** button.	
4.	Click **Search Vouchers** under the "Quick Links" section of the DRGR Home page.	
5.	Click on **Create Voucher** on the left side panel.	Search for Work Plans to Create Vouchers screen appears
6.	Use the search criteria to find approved work plans for which vouchers can be created.	
7.	From **Select** column under the search results, select the work plans to include in the voucher/payment request.	Only HUD approved work plans appear within the search results.
8.	Click **Add Selected Work Plans** to Voucher button.	
9.	Click the **continue** button.	
10.	Enter the total draw amount by work plan in the field under the **Drawdown Amount** column.	The draw amount must not exceed amount under Available Amount.
11.	Click the **Update Available Amount** button.	Select this button whenever you make a change to the draw amount.
12.	Click the **Submit Voucher** button.	
13.	Click the **Confirm Voucher** button.	Voucher is submitted to 2nd person for confirmation and submission to HUD.
Remaining steps below to be complete by TA providers with Draw Approver role.		
14.	Open an Internet browser and access the DRGR site.	Or click here: https://drgr.hud.gov/DRGRWeb
15.	Log in to DRGR with your B ID and password.	
16.	Read the disclaimer then click **I Accept** button.	
17.	Click **Drawdown** in the blue navigation.	
18.	Click on **Maintain Voucher** on the left side panel.	Search for Work Plans to Create Vouchers screen appears
19.	Use search criteria to find voucher to approve.	
20.	From **Select** column under the search results, select the vouchers to approve.	
21.	Ensure that the Submission Date shows today's date.	
22.	Add comments under **Comments** box.	
23.	Upload supporting documents, include Monthly Activity (excel) file and reports from your organization's financial management system.	See Attachment 4 of the cooperative agreement provisions for standards.
24.	Click **Approve Selected** button.	
25.	Log out of DRGR.	
26.	Send an email to the assigned GTR and GTM/POTAC.	Include voucher number and associated monthly activity template in the email.

9. Resources and points of contact

The following resources and contact persons are available to assist with managing your TA awards, TA business processes and requirements, and access to the various TA systems.

· https://www.hud.gov/program_offices/comm_planning/about/cpdta/guidance includes post-award guidance and list of Government Technical Representative (GTR), and Government Technical Monitor (GTM) or Program Office Technical Assistance Coordinator (POTAC) assigned to each award

· Dan.Hegner@icf.com or Vicki.Liu@icf.com of ICF: assist with using the TA Portal for user accounts, work plans, and monthly status reporting.

· DRGR user accounts and implementation of TA business processes in DRGR: Option 1) email your GTR; or Option 2) send an AAQ inquiry through HUDExchange.

· DRGR password assistance: contact HUD's HITS Help Desk at 1-1-888-297-8689 and select option 9. You'll need you DRGR PIN to get password assistance.