Quarterly Performance Report (QPR) Module

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6. Quarterly Performance Report (QPR) Module

The QPR module in DRGR provides a tool and framework for communication of grant program progress to HUD and the public. Quarterly Performance Reports are tools for grantees to identify progress towards statutory requirements, such as achievement of national objectives and expenditure milestones, and provide a vehicle for grantees to tell their stories of how investments are achieving results in their communities.

The QPR reports accomplishments for each quarter and on a cumulative basis at the grant and activity level by:

- Identifying accomplishments once a national objective has been met
- Pulling financial data as entered in the Drawdown Module
- Providing narrative detail on progress of the grant as a whole and per activity

Timely submission of QPRs in DRGR is an important step in reporting accomplishments. The data in the QPR is aggregated and sent to Congress and is also placed on the DRGR Public Data Portal.

Grantee users add, enter information, and submit the QPR for HUD approval. HUD users review QPRs and are able to enter comments when approving or rejecting them. In very rare circumstances, HUD Superusers also have the ability to "unapprove" QPRs as needed.

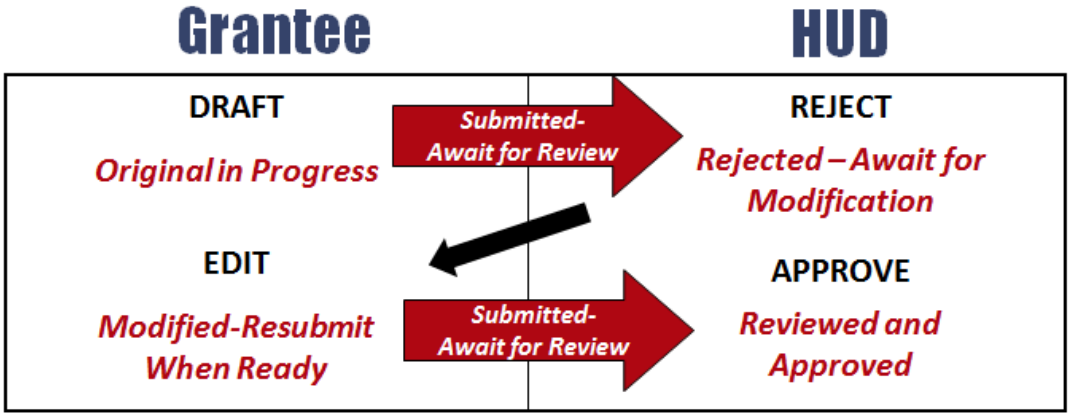
QPR Overview

6.1.1 QPRs and Action Plans Interrelationship

A QPR is integrally tied to the Action Plan. Grantees report on activities in the QPR based on the set up, budgeting and proposed accomplishments in the Action Pan. If an Activity is not set-up in the Action Plan, it will not be available for reporting in the QPR. Further, if an accomplishment is not proposed in the Action Plan, it will likewise not be available for reporting in the QPR. For this reason, QPRs cannot be submitted by a grantee if changes have been made to the Action Plan (e.g. Projects or Activities added, budgets modified, etc.) until those changes are reviewed and approved by HUD.

Both QPRs and Action Plans follow the same review process shown in Figure 6-1. Section 6.1.2 below provides additional information on the rules governing QPR and Action Plan processes.

Figure 6-1: Action Plan / Reporting Process showing relationship among Grantee, HUD, AP, and QPR



6.1.2 DRGR Rules for the Action Plans / QPRs Process

The Action Plan must be in 'Reviewed and Approved' status in order for a grantee to submit a QPR. When Action Plans are in approved status, grantees can continue to add and submit QPRs for approval regardless of the status of prior QPRs. However, **grantees should submit and HUD staff should approve QPRs in order** since the data is cumulative based on prior QPRs.

Action Plan changes should be submitted well in advance of QPR due dates to allow time for HUD review of Action Plan changes. Grantees are encouraged to coordinate with their HUD CPD Representatives on submissions of Action Plans to avoid interference with QPR submissions.

6.1.3 QPR Due Dates

A grantee's first QPR is due 30 days after the first **full quarter** after the initial grant agreement is signed. Due dates vary by grant appropriation. With the exception of NSP2, most grant programs follow the due dates below (NSP2 QPRs are due 10 days following the Reporting Period end date):

Reporting Period End Date	Grantee QPR Submission Deadlines
31-March	30-Apr
30-Jun	30-Jul
30-Sep	30-Oct
31-Dec	30-Jan

6.1.4 Submit QPR Roles

All grantee users except 'View Only' users can edit QPRs. However, in order to submit a QPR to HUD, grantee users must have an additional 'Submit QPR' role. See *Section 3 – Admin Module* for more information on adding and changing grantee user roles.

6.1.5 Subordinate Grantees

Grantee Admin users can elect to authorize restricted access to users from Subordinate Grantees. This access includes an 'Edit QPR' role, which allows authorized Subordinate Grantee users to edit activities in the QPR for which they are the primary Responsible Organization. Subordinate Grantee users can never submit a QPR or edit activities where they are not the primary Responsible Organization.

See *Section 3 – Admin Module* for more information about associating a Subordinate Grantee and assigning roles, including the 'Edit QPR' role, to Subordinate Grantee users.

6.2 QPR Functions

Grantees can perform a variety of functions in the QPR module to complete and modify grant reporting. The basic grantee QPR functions include:

- Adding a QPR to a grant, including adding 'missing' QPRs
- Editing a QPR, including adding accomplishment data and completing 'prior period corrections' (as necessary)
- Submitting a QPR
- HUD Review of QPR
- Viewing and Downloading a QPR

In addition, Grantee users are able to complete the QPR-related function of maintaining addresses. HUD users review submitted QPRs. HUD users also complete Grant Closeout Checklists (see Appendix 1) once a grant is ready for closeout.

6.2.1 Add QPR

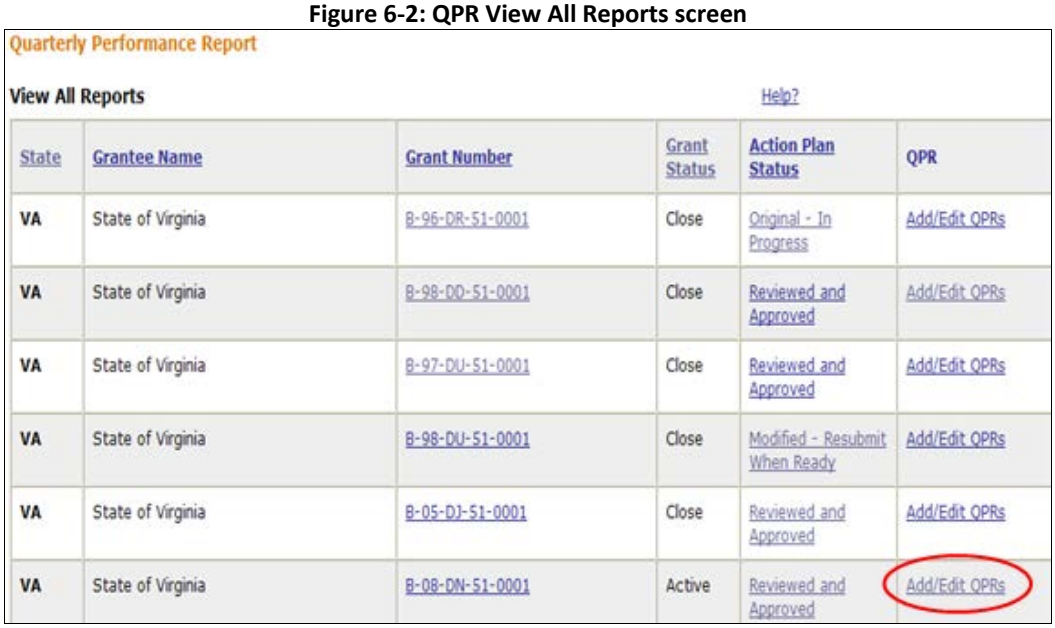
The following section describes how grantees add QPRs in DRGR, including adding missing QPRs. If a QPR is not available for a particular quarterly reporting period, the grantee will need to add the QPR before entering/editing Performance Report information.

6.2.1.1 Procedure: Add QPR

The steps to add a QPR are shown below:

1. Following login and acceptance of the "Disclaimer", click the <**QPR**> tab in the navigation bar.
   - This action opens the "View All Reports" screen (Figure 6-2).

Figure 6-2: QPR View All Reports screen



Quarterly Performance Report

View All Reports

Help?

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
VA	State of Virginia	B-96-DR-51-0001	Close	Original - In Progress	Add/Edit QPRs
VA	State of Virginia	B-98-DD-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-97-DU-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-98-DU-51-0001	Close	Modified - Resubmit When Ready	Add/Edit QPRs
VA	State of Virginia	B-05-DJ-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-08-DN-51-0001	Active	Reviewed and Approved	Add/Edit QPRs

2. In the right 'QPR' column, click the <**Add/Edit QPR**> link for the desired Grant.
   - This action opens the "Add/Edit QPRs" screen (Figure 6-3).

Figure 6-3: Add/Edit QPRs screen

Quarterly Performance Report

Add/Edit QPRs - [redacted]

Help?

Grant Number: T-09-NN-36-0003

Contract Start Date: 10/08/2009

Grant Status: Active

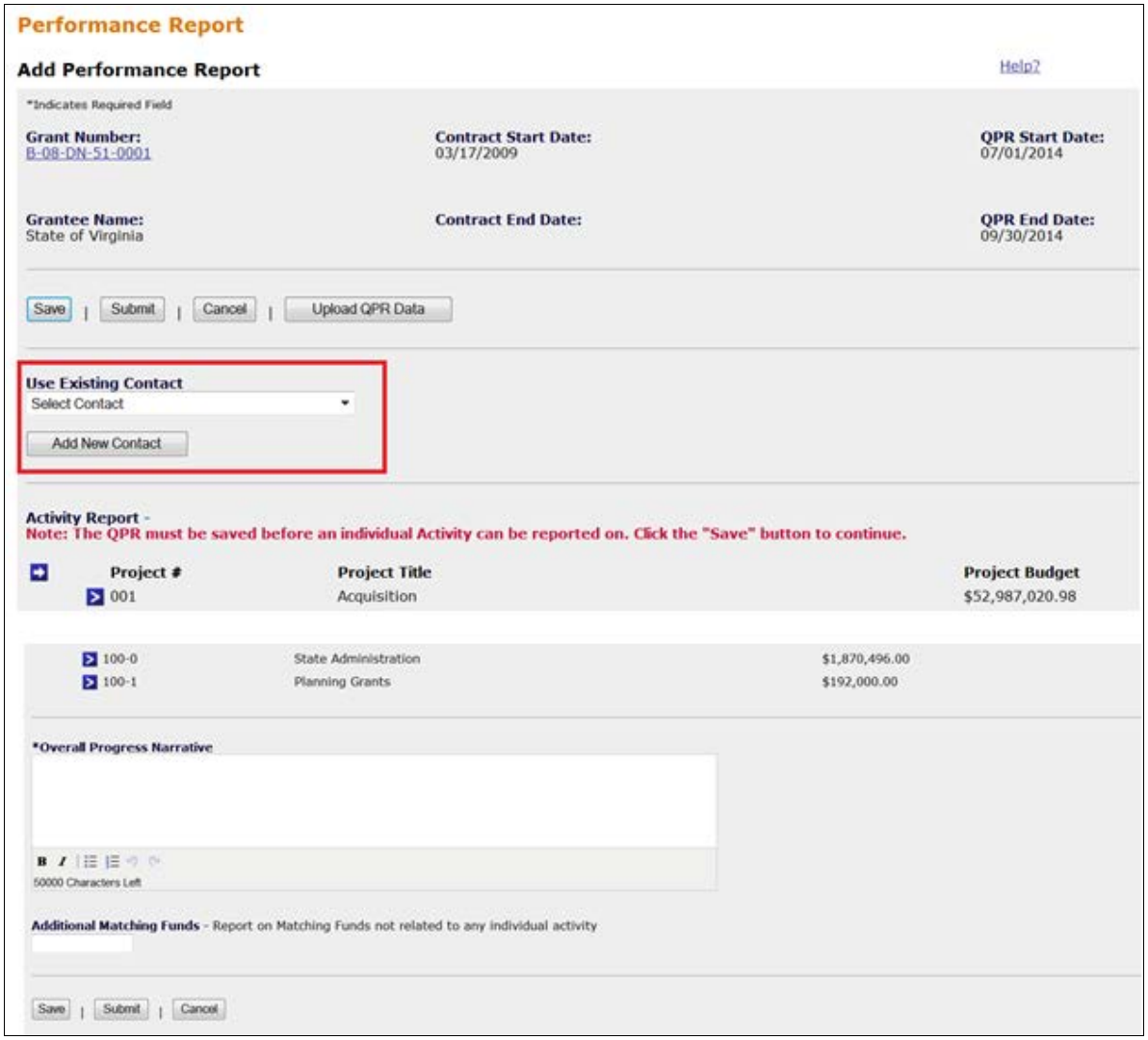
Contract End Date:

Grant Amount: $[redacted]

Due Date	Date Submitted	Action			Status
01/30/2012		Add			
10/30/2011		View	Download Print Version	Edit	Original - In Progress
07/30/2011	07/29/2011	View	Download Print Version		Reviewed and Approved
04/30/2011	04/29/2011	View	Download Print Version		Reviewed and Approved
01/30/2011	'01/29/2011	View	Download Print Version		Reviewed and Approved
10/30/2010	10/29/2010	View	Download Print Version		Reviewed and Approved

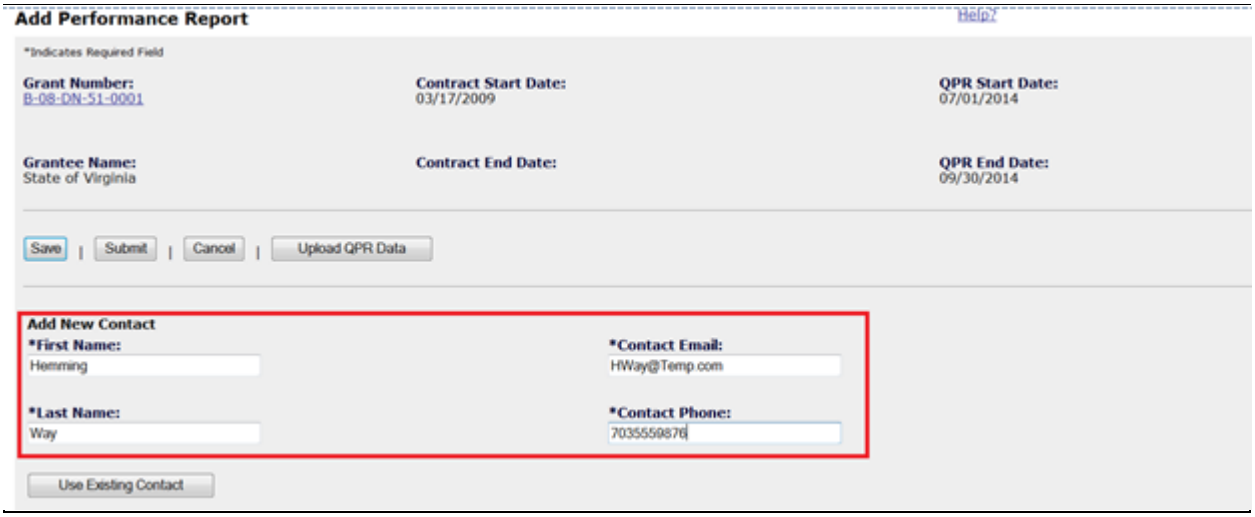
3. To Add a Quarterly Performance Report, click the <**Add**> link for the next/current QPR.
   - This action opens the "Add Performance Report" screen (Figure 6-4).
   - The system generates a due date for the QPR after the last one created, but each QPR must be added by grantee staff on this screen. If a grantee stops adding QPRs, new prompts for due dates are not generated.
   - The <**Edit**> link is available for QPRs that have been added and that have not yet been submitted for review.

Figure 6-4: QPR Add Performance Report screen



4. Select a contact from the <**Use Existing Contact**> dropdown list, or add a new contact by clicking the <**Add New Contact**> button.
   - Clicking the <Add New Contact> button opens a new "Add Performance Report" screen (Figure 6-5) where users can enter the name and contact information of a new contact.

Figure 6-5: QPR Add Performance Report screen with Add New Contact entries



5. Enter a narrative in the 'Overall Progress Narrative' field (required).

> **Overall Progress Narrative**
>
> The progress narrative is especially helpful to report on the status of activities before expenditures start such as: # of contracts awarded/agreements signed, pending environmental review or procurement. This can help to communicate why it doesn't look like progress is being made (expenditures or performance measures). The level of detail is up to the grantee.
>
> This space can also be used to report other accomplishments for programs that don't fit into performance measures. These could include special accomplishments under the activity like community outreach.

6. If there are 'Additional Matching Funds,' enter dollar amounts in the field provided.
7. The <**Save**> button saves all entered information and adds the Performance Report.
   - This action returns you to the "Add/Edit Performance Report" screen where the 'Add' status in the 'Action' column is updated to include 'View', 'Download Print Version' and 'Edit' links.

     Note: The QPR must be saved before grantees can report on individual activities.
8. The <**Cancel**> button cancels all information that has been changed since the Performance Report was previously saved.
   - This action returns you to the "Add/Edit Performance Report" screen.

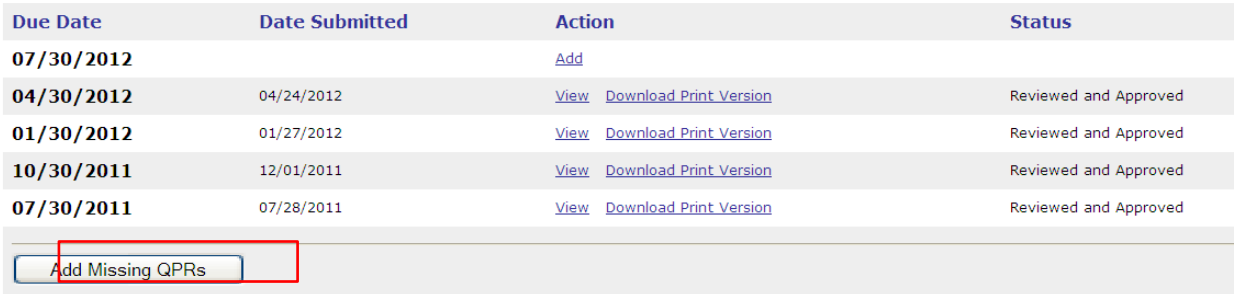
6.2.1.2 Procedure: Add Missing QPR

In DRGR, QPRs will not automatically be created if there are no financial transactions, such as obligations or vouchers completed, during the quarter. Grantees are normally prompted to report after each full quarter after grant agreements are signed. If this does not occur, please contact your CPD Representative to work with DRGR_Help@hud.gov to make sure the correct contract date is entered so grantee staff can add QPRs for the period.

Even with the contract dates, sometimes DRGR may skip a period when there are no financial transactions. Grantees will need to add these 'missing' QPRs following the steps below:

1. Follow steps 1 and 2 above in Section 6.2.1.1.
   - These steps result in the "Add/Edit Performance Report" screen being displayed.
   - If there is a missing QPR an <**Add Missing QPRs**> button will appear on the "Add/Edit Performance Report" screen (Figure 6-6).
2. Click the <**Add Missing QPRs**> button
   - The missing QPR(s) will be added and displayed on the "Add/Edit Performance Report" screen.

Figure 6-6: QPR 'Add Missing QPRs' button



Due Date	Date Submitted	Action	Status
07/30/2012		Add	
04/30/2012	04/24/2012	View Download Print Version	Reviewed and Approved
01/30/2012	01/27/2012	View Download Print Version	Reviewed and Approved
10/30/2011	12/01/2011	View Download Print Version	Reviewed and Approved
07/30/2011	07/28/2011	View Download Print Version	Reviewed and Approved

Add Missing QPRs

6.2.2 Edit QPR

After QPRs are added and saved, the next step is to edit reporting for individual activities. Generally, grantees will report only on activities that have shown progress (e.g. achieved a national objective, expended funds) during the reporting period, and may not need to report on every activity established in the Action Plan. Further, DRGR will not automatically generate an activity for editing in the QPR if there have been no financial transactions (e.g. obligations, drawdowns) completed in the reporting period.

However, reporting on activities is at the discretion of the grantee's CPD Representative. Grantees are encouraged to coordinate with their CPD Representatives outside of DRGR to understand reporting expectations.

Note: In addition to the procedures described in this section, grantees can complete a variety of QPR edit functions using DRGR data upload capabilities. For more information about data uploads. See *Section 9 – Uploads*.

6.2.2.1 Procedure: Edit QPR – Edit Activity screen

The first step in editing individual activities in the QPR is to navigate to the "Edit Performance Report – Activity" screen, which provides the basis for all activity reporting. This section details the process to navigate to the "Edit Performance Report – Activity" screen. Subsequent sections detail how to report on "Direct Benefit" (Section 6.2.2.2) and "Area Benefit" activities (Section 6.2.2.3).

Follow the steps below to access the "Edit Performance Report – Activity" screens:

1. Following login and acceptance of the "Disclaimer", click the <**QPR**> tab in the navigation bar.
   - This action opens the "View All Reports" screen (Figure 6-7).

Figure 6-7: QPR View All Reports screen

Quarterly Performance Report

View All Reports

Help?

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
VA	State of Virginia	B-96-DR-51-0001	Close	Original - In Progress	Add/Edit QPRs
VA	State of Virginia	B-98-DD-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-97-DU-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-98-DU-51-0001	Close	Modified - Resubmit When Ready	Add/Edit QPRs
VA	State of Virginia	B-05-DJ-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-08-DN-51-0001	Active	Reviewed and Approved	Add/Edit QPRs

2. In the right 'QPR' column, click the <**Add/Edit QPR**> link for the desired Grant.
   - This action opens the "Add/Edit Performance Report" screen (Figure 6-8).

Figure 6-8: Add/Edit Performance Report screen

Performance Report

Add/Edit QPRs - State of Virginia

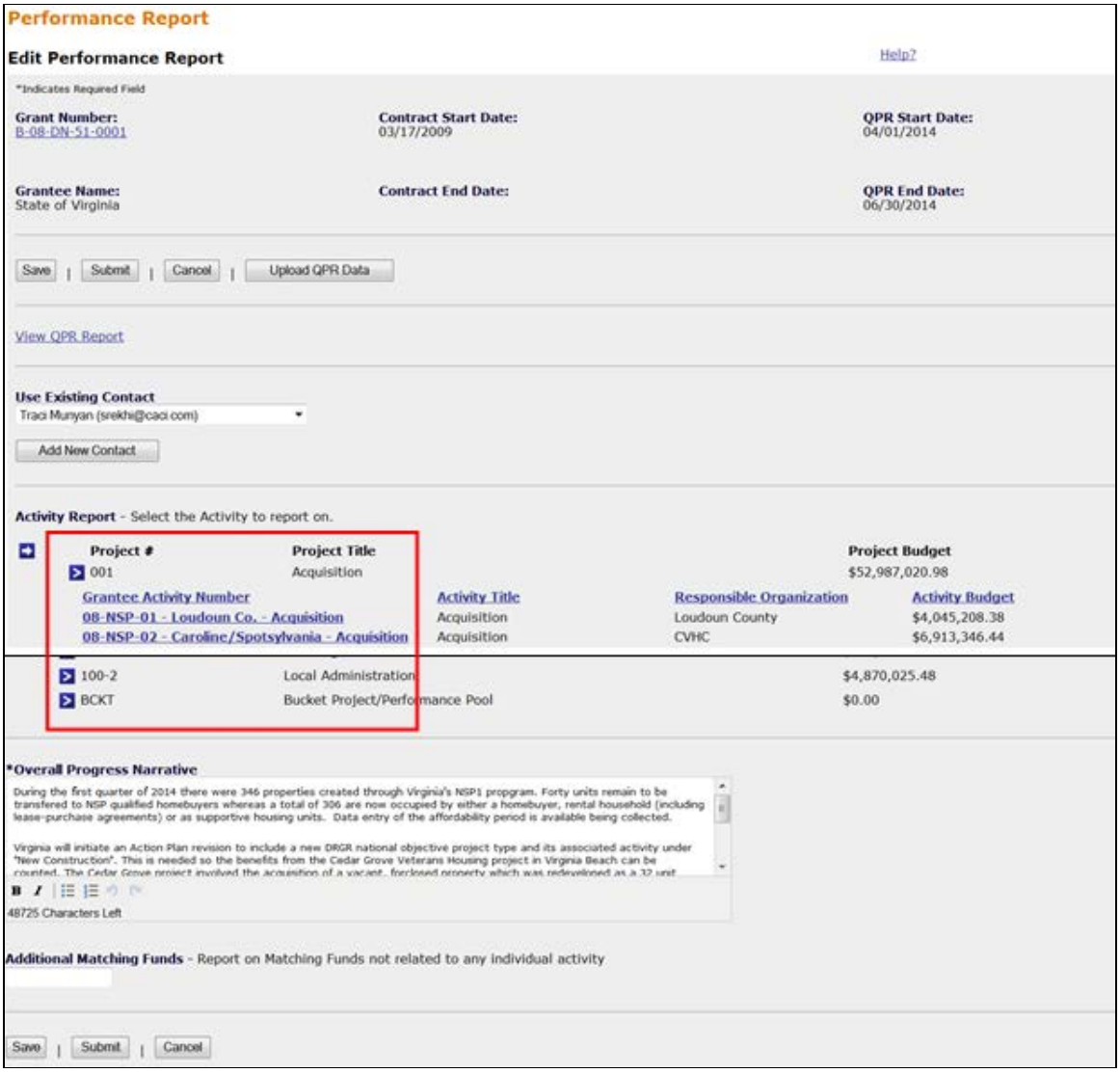
Help?

Grant Number : B-08-DN-51-0001
Contract Start Date: 03/17/2009
Grant Status: Active
Contract End Date:
Grant Award Amount: $38,749,931.00
LOCCS Authorized Amount: $38,749,931.00
Maintain Address(s)
* - Actual period does not match Reporting period

Due Date	Reporting Period	Action	Date Submitted	Type	Status	Submitter
10/30/2014	07/01/2014 - 09/30/2014	Add				
07/30/2014	04/01/2014 - 06/30/2014	View Delete Download Print Version Edit	05/02/2014		Rejected - Await for Modification	WHITGA - W
04/30/2014	01/01/2014 - 03/31/2014	View Delete Download Print Version	05/02/2014		Reviewed and Approved	WHITGA - W
01/30/2014	10/01/2013 - 12/31/2013	View Delete Download Print Version	02/11/2014		Reviewed and Approved	WHITGA - W

3. To edit an existing Quarterly Performance Report, click the <**Edit**> link for the desired QPR reporting period.
   - This action opens the "Edit Performance Report" screen (Figure 6-9).

Figure 6-9: QPR Edit Performance Report screen



4. Use the 'Grantee Activity Number' links to select the activity you want to edit from the left column 'Grantee Activity Number.'

   Note: Activities are grouped by their associated Project on the "Edit Performance Report" screen. Users can click the blue arrow icons to hide and show activities within each project.

   - This action opens the "Edit Performance Report – Activity Page 1".
   - This screen will be the beginning point for reporting on individual activities in the QPR.

6.2.2.2 Procedure: Edit QPR – Direct Benefit Activities

The QPR will show all performance measures for which the grantee has proposed in the Action Plan. In addition, the activity designation of 'Direct Benefit' and 'Area Benefit' in the Action Plan will impact reporting in the QPR at the activity level. See *Section 4 – Action Plan* for more information on activity set-up.

For 'Direct Benefit' activities, reporting for households assisted (including race and income information) should only be done once an end-use has been met (e.g. achievement of a national objective).

In addition, it is important to note that in the QPR, accomplishments (and expenditure and matching funds information), should be entered **only for the quarterly reporting period**.

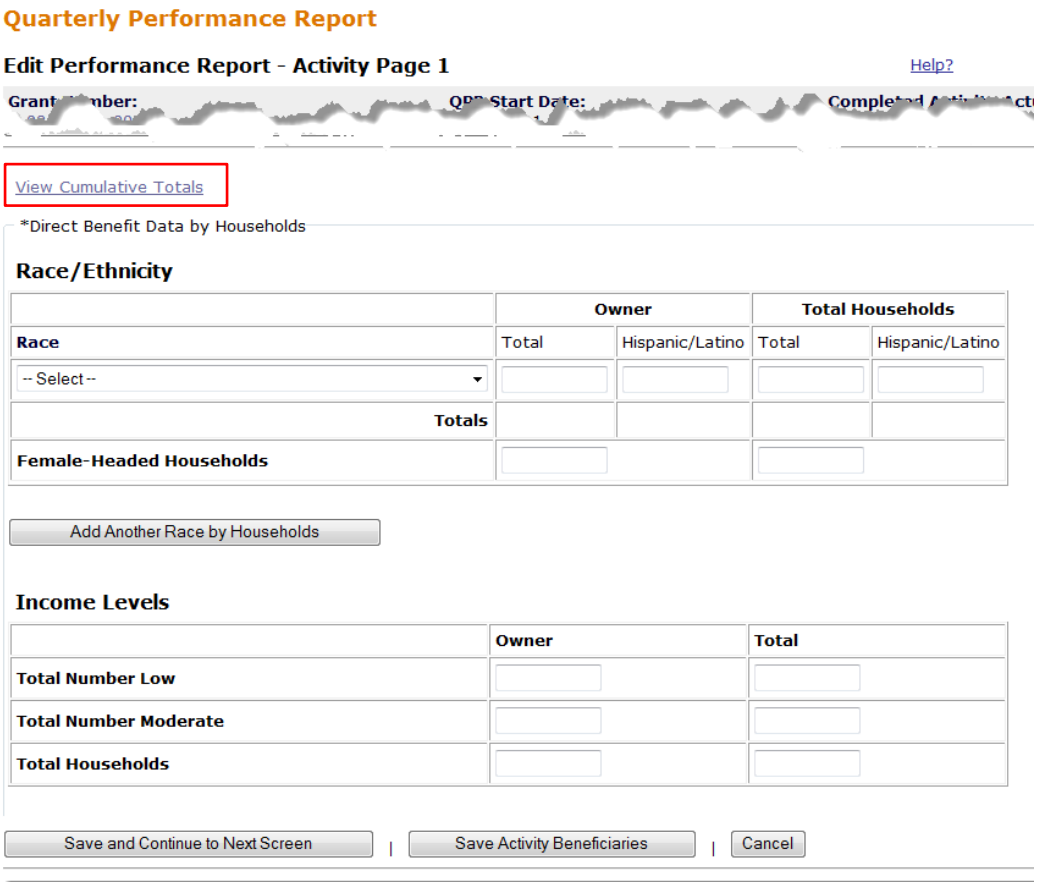
DRGR calculates all cumulative data entered by the grantee from current and prior reports. These cumulative totals can be accessed via the "Edit Performance Report – Activity" screen or by generating a report in the reports module (see *Section 7 – Reports* for more information).

If users (in error) enter the total/cumulative accomplishments for an activity in each QPR, the system will aggregate all reported totals and have an inaccurate and inflated accomplishment (or expenditure or matching funds) value for the activity. This situation will also likely lead to system errors when users report on the activity in current/future QPRs. These types of errors can typically be addressed using the "Prior Period Correction" procedure described in Section 6.2.2.4.

Note: To edit a 'Direct Benefit' activity in the QPR, follow the steps outlined below.

1. Follow steps 1-4 in Section 6.2.2.1 and select a Direct benefit Activity.
   - At the conclusion of these steps, the "Edit Performance Report – Activity Page 1 (for Direct Benefit activities)" will be displayed (Figure 6-10).
2. Optional but Recommended: click the <**View Cumulative Totals**> link prior to entering data to determine what data has already been entered in prior QPRs for the activity.

Figure 6-10: Edit Performance Report (Direct Benefit) – Activity Page 1 screen



3. Enter 'Race/Ethnicity' data by selecting a race from the dropdown menu and entering numeric values in the Household fields. Values must also be entered for any households that are 'Hispanic/Latino' in the designated Household fields.
   - Click the <**Add Another Race by Household**> button to add another race.

4. Add values for 'Female-Headed Households' in the designated fields.
5. Enter values designating the income levels for the assisted households.

   Note: Race/Ethnicity, Female-Headed Household and Income fields will include 'Owner' and/or 'Renter' fields depending upon the selection of Owner and/or Renter housing tenure type proposed in the Action Plan.

6. If, and only if, the activity is complete (including being marked complete in the Action Plan), enter an end date in the '**Completed Activity Actual End Date**' field.
7. Click the <**Save and Continue to Next Screen**> button (users can also click the <**Save Activity Beneficiaries**> button to save the information entered on this screen without moving on).

   Note: DRGR will provide the user with an error message upon saving if the cumulative numbers of total households (including the data entered in the current QPR) do not match across the 'Race/Ethnicity', 'Female-Headed Households' and 'Income' data sections.

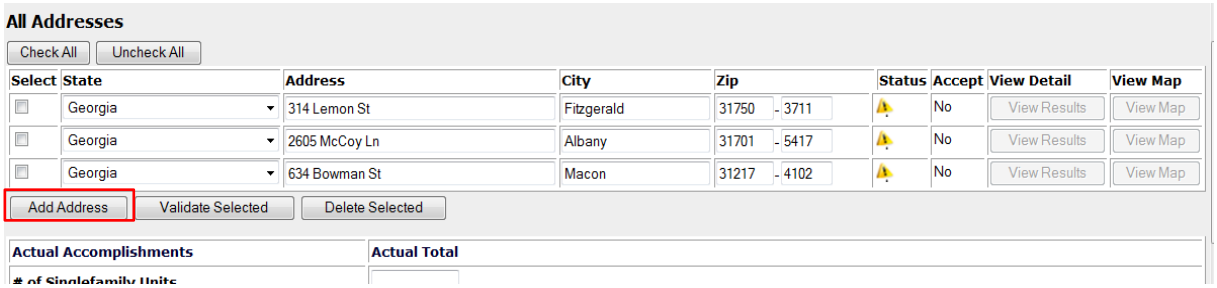
   - This action opens the "Edit Performance Report – Page 2" screen.

8. On the "Edit Performance Report – Page 2" screen, click the <**Add Addresses**> button to add addresses once a property has reached its end use for the activity (Figure 6-11).

   Note: Adding addresses into DRGR is not always required for every appropriation. Check with your CPD Representative if you are unsure whether addressees are required to be entered for your grant.

   Note: Addresses should only be entered once in DRGR, and entered only in the quarter when the property met an end use. Addresses can be managed across QPRs using the 'Maintain Addresses' function – see Section 6.2.5 for more information.

Figure 6-11: Edit Performance Report (Direct Benefit) – Activity Page 2 screen – Add Addresses



9. Once address information has been entered, select the added addresses using the checkboxes to the left of each address and click the <**Validate Selected**> button (Figure 6-12).

   - This action will cause a Geocode Service Center (GSC) to verify the selected addresses and will result in a match percentage showing in the 'Status' column (Figure 6-13).

Figure 6-12: Validate Addresses

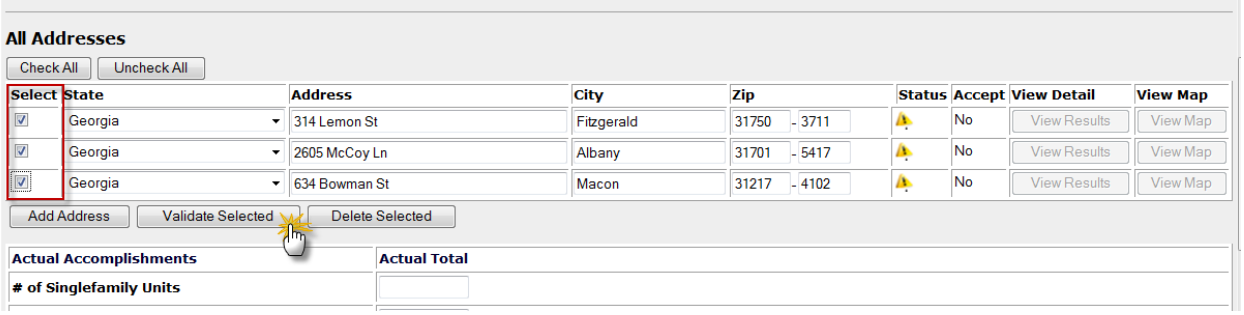
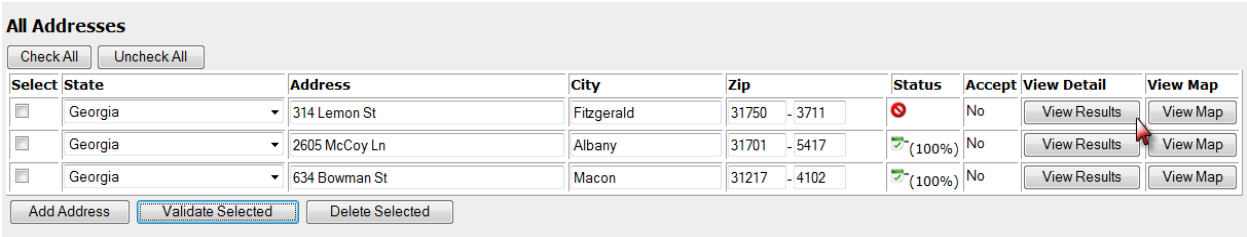
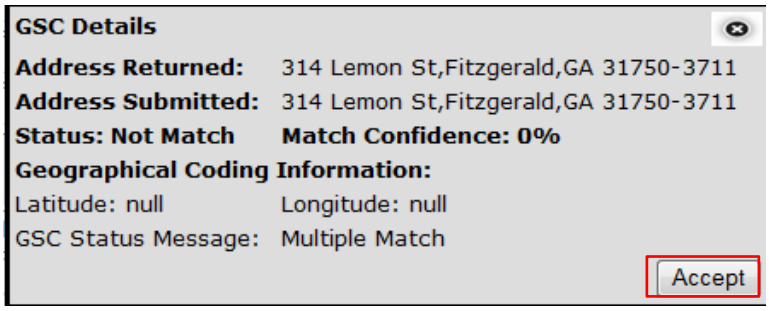


Figure 6-13: Addresses Validated by HUD GSC



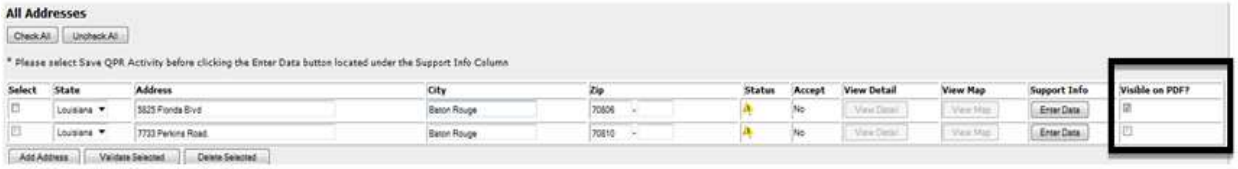
10. Click the <**View Detail**> button to see additional information about the address entered.
    - GSC details will be displayed (Figure 6-14).

Figure 6-14: HUD GSC Details



11. Click the <**Accept**> button to accept the address.
12. Optional: users can click the <**View Map**> button (Figure 6-13) to see the address on a map.
13. Optional: users can select whether or not to have entered addresses display in the QPR (or Action Plan) PDF download by checking or unchecking the '**Visible on PDF?**' checkbox (Figure 6-15). Private residential addresses should not be visible on a PDF. See additional information about QPR PDF downloads in Section 6.2.4.
    - If the box is unchecked, addresses will not be visible on QPR (and Action Plan) PDF downloads.
    - If the box is checked, addresses will appear on QPR (and Action Plan) PDF downloads.

Figure 6-15: Example of Optional Accomplishments



14. Enter any 'optional' Actual Accomplishments for the reporting period on the "Edit Performance Report – Page 2" screen (Figure 6-16).

    Note: 'Optional' accomplishments available in the QPR will depend on the proposed accomplishments in the Action Plan.

Figure 6-16: Example of Optional Accomplishments

Actual Accomplishments	Actual Total
# of Properties	
#Energy Star Replacement Windows	
#Additional Attic/Roof Insulation	
#Efficient AC added/replaced	
#Replaced thermostats	
#Replaced hot water heaters	
#Light Fixtures (indoors) replaced	
#Light fixtures (outdoors) replaced	
#Refrigerators replaced	
#Clothes washers replaced	
#Dishwashers replaced	
#Units with solar panels	
#Low flow toilets	
#Low flow showerheads	

15. Enter Actual Accomplishments for Housing Units (as applicable) for the reporting period (Figure 6-17).

    Note: Accomplishment fields will depend on activity set-up in the DRGR Action Plan.

    Note: Cumulative unit values (including entries in the current QPR) must match across household values entered on the "Edit Performance Report – Activity Page 1" screen. If cumulative values do not match, a system error will occur when saving the QPR activity edits. See Section 6.2.2.4 for information on correcting data errors.

Figure 6-17: Example of Housing Unit Accomplishments

	Actual Total
# of Singlefamily Units	
# of Housing Units	

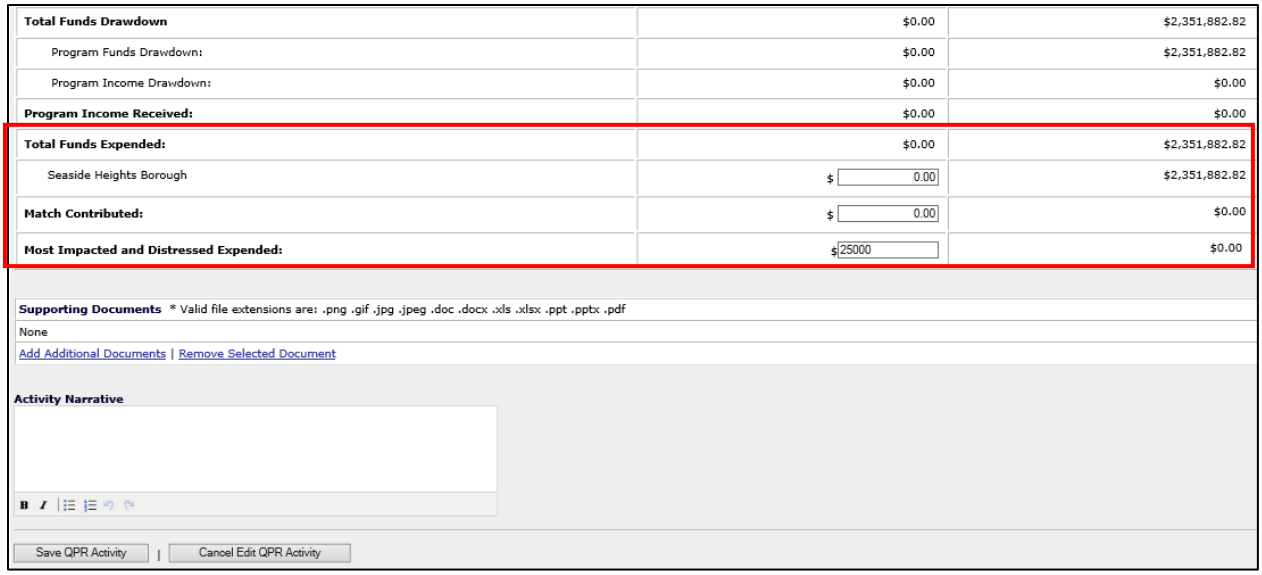
16. Enter 'Total Funds Expended' (required), 'Most Impacted and Distressed Expenditures (MID)' (as applicable) and 'Match Contributed' (as applicable) for the quarter being reported (Figure 6-18).

    Grantee users must enter MID expenditures for each activity that will count toward the MID threshold requirement.

    - If an activity is only available in MID areas, the MID expenditures should equal the Activity expenditures.
    - If an activity is available in MID areas and outside MID areas, the MID expenditures should equal the amount of funds expended in the MID areas.
    - If an activity is not available in MID areas, the MID expenditures should be left blank or $0.00.

    Note: Other financial information on the "Edit Performance Report – Page 2" screen (e.g. Budget, Obligation, Funds Drawdown and Program Income Received) is automatically pulled and aggregated from the grantee's Action Plan entries and Drawdown module transactions in DRGR.

Figure 6-18: QPR Activity financial information



Total Funds Drawdown	$0.00	$2,351,882.82
Program Funds Drawdown:	$0.00	$2,351,882.82
Program Income Drawdown:	$0.00	$0.00
Program Income Received:	$0.00	$0.00
Total Funds Expended:	$0.00	$2,351,882.82
Seaside Heights Borough	$ 0.00	$2,351,882.82
Match Contributed:	$ 0.00	$0.00
Most Impacted and Distressed Expended:	$ 25000	$0.00

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf

None

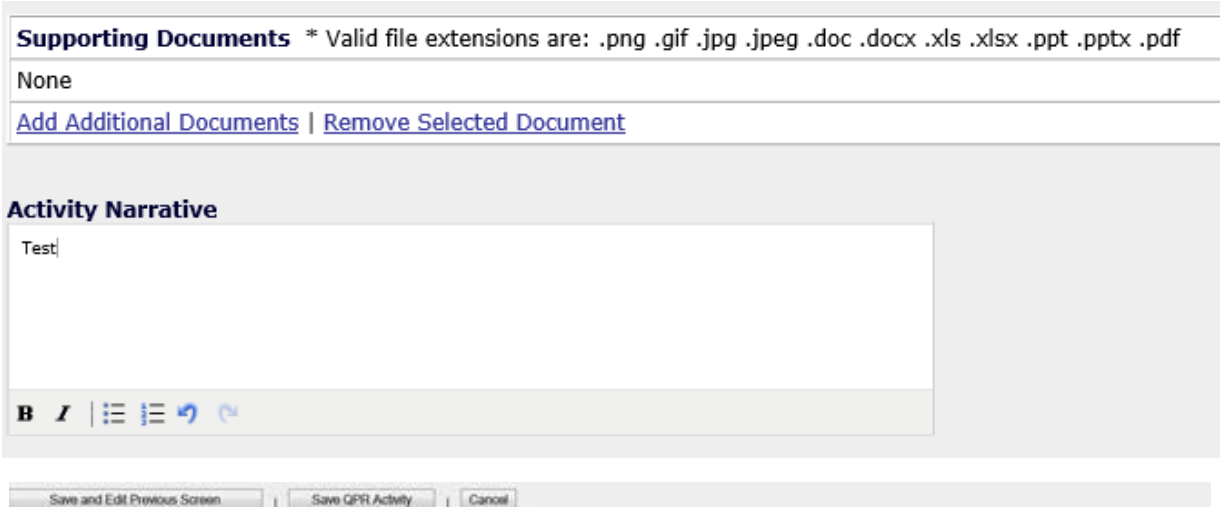
Add Additional Documents | Remove Selected Document

Activity Narrative

Save QPR Activity | Cancel Edit QPR Activity

17. Optional: grantees can attach documents and images as supporting information for the activity (e.g. a photo of completed housing rehabilitation) by clicking the <**Add Additional Documents**> link in the 'Supporting Documents' section (Figure 6-19).
    - If the attached supporting document is an image file, the image will be displayed in the Supporting Document section for the activity in the QPR PDF download.
18. Add a narrative describing the progress and status of the activity in the 'Activity Narrative' text field (Figure 6-19).

Figure 6-19: QPR Supporting Documents and Activity Narrative



19. When complete, click the <**Save QPR Activity**> button to save all entered information.
    - This action returns you to the "Edit Performance Report" screen with a "Success: QPR Activity has been added" message.
    - Click the <**Edit Previous Screen**> button allows you to return to the "Edit Performance Report – Activity Page 1" to carry out any edits on the values entered on that page.
    - The <**Cancel**> button cancels any of the information entered into the report since the last save took place and returns the user to the "Edit Performance Report" screen with no changes.

6.2.2.3 Procedure: Edit QPR – Area Benefit activities

Area Benefit activities differ from Direct Benefit Activities in that beneficiaries of the activity are determined by the service area entered in the DRGR action plan (via U.S. Census Data or Survey Data). Therefore, for Area Benefit activities, grantees do not have to enter beneficiaries in the QPR (e.g. race and income household data); this information is pulled into the QPR from the grantee's action plan.

In the QPR, grantees will only report on optional and required unit accomplishments, enter addresses, enter expenditures and matching funds, and add an activity narrative. These reporting functions follow the same process described in Section 6.2.2.2 for Direct Benefit activities; however, all reporting is accomplished on one page of the "Edit Performance Report – Activity" screen (there is no page 2 for Area Benefit activities).

As with Direct Benefit activities, all accomplishment data should be entered only when an end-use is met for the activity, and all information entered in the QPR should reflect only values for the reporting period (i.e. do not enter cumulative information).

To edit activity reporting for Area Benefit activities, follow the steps below:

1. Follow steps 1-4 in Section 6.2.2.1 and select an 'Area Benefit' Activity.
   - At the conclusion of these steps, the "Edit Performance Report – Activity Page 1 (for Area Benefit activities)" will be displayed (Figure 6-20 and Figure 6-21).

Figure 6-20: Edit Performance Report – Activity Page 1 screen, upper section

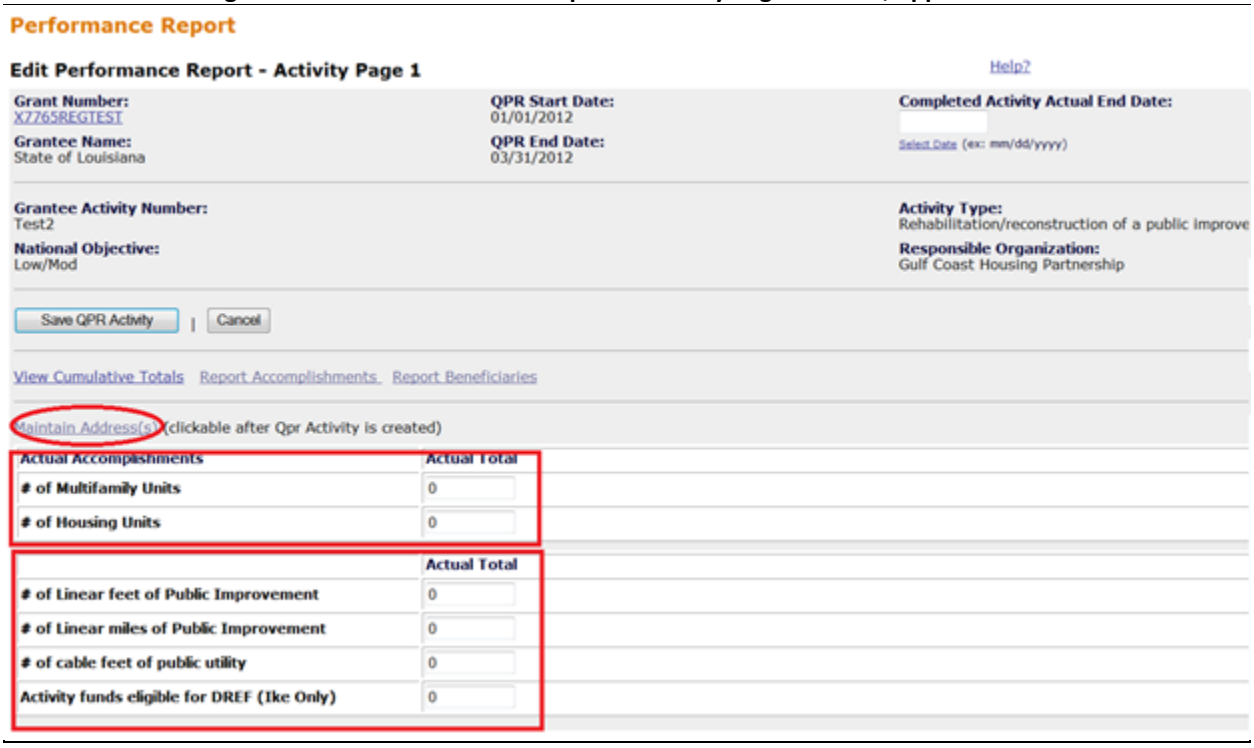
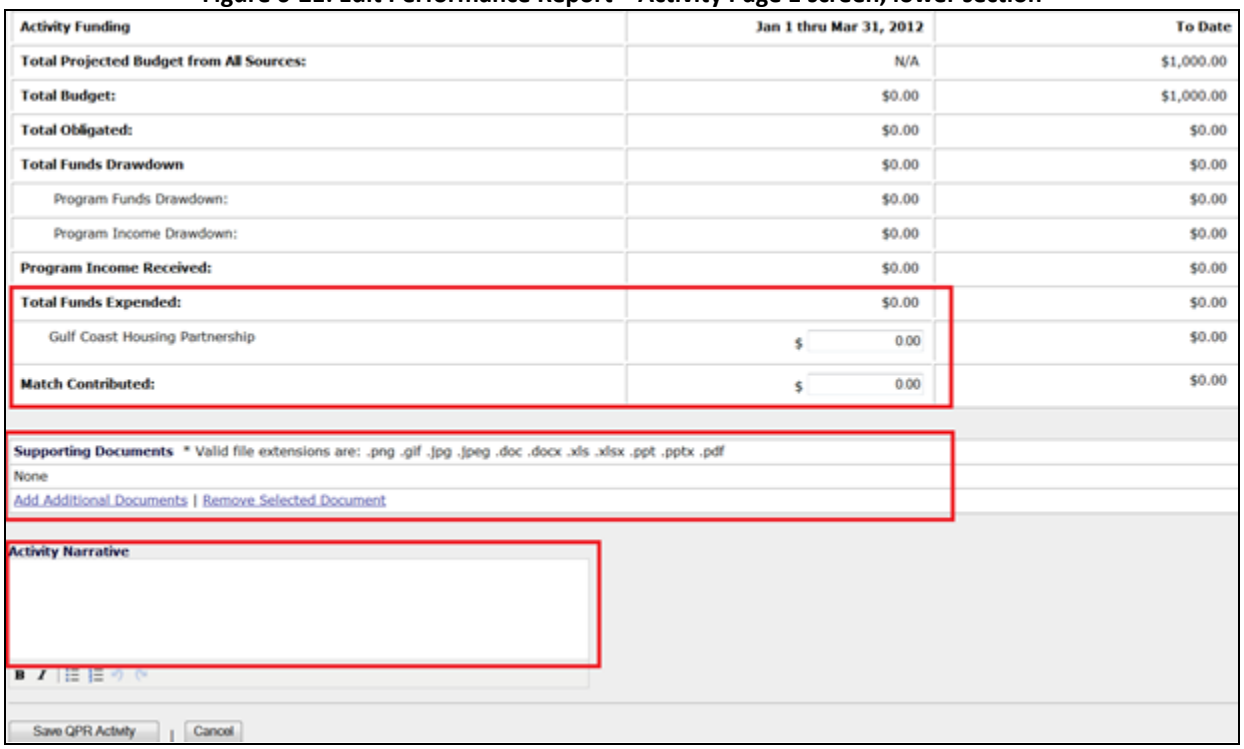


Figure 6-21: Edit Performance Report – Activity Page 1 screen, lower section



Activity Funding	Jan 1 thru Mar 31, 2012	To Date
Total Projected Budget from All Sources:	N/A	$1,000.00
Total Budget:	$0.00	$1,000.00
Total Obligated:	$0.00	$0.00
Total Funds Drawdown	$0.00	$0.00
Program Funds Drawdown:	$0.00	$0.00
Program Income Drawdown:	$0.00	$0.00
Program Income Received:	$0.00	$0.00
Total Funds Expended:	$0.00	$0.00
Gulf Coast Housing Partnership	$ 0.00	$0.00
Match Contributed:	$ 0.00	$0.00

Supporting Documents * Valid file extensions are: .png .gif .jpg .jpeg .doc .docx .xls .xlsx .ppt .pptx .pdf

None

Add Additional Documents | Remove Selected Document

Activity Narrative

Save QPR Activity | Cancel

2. Click the <**Maintain Address(s)**> link to enter the address(s) where the activity is being conducted (Figure 6-20).
   - Additional information about address entry is found in Sections 6.2.2.2 (entering addresses within the QPR) and 6.2.5 (entering addresses across QPRs).
3. Enter Actual Accomplishments in the 'Actual Totals' fields for the reporting period (Figure 6-20).

   Note: Actual Accomplishment fields will depend on activity set-up in the DRGR Action Plan.
4. Enter amounts for 'Total Funds Expended' (required) and 'Match Contributed' (as applicable) for the reporting period (Figure 6-21).
5. Optional: grantees can attach documents and images as supporting information for the activity (e.g. photo of completed housing rehabilitation) by clicking the <**Add Additional Documents**> link in the 'Supporting Documents' section (Figure 6-21).
   - If the attached supporting document is an image file, the image will be displayed in the Supporting Document section for the activity in the QPR PDF download.
6. Add a narrative describing the progress and status of the activity in the 'Activity Narrative' text field (Figure 6-21).
7. If, and only if, the activity is complete (including being marked complete in the Action Plan), enter an end date in the '**Completed Activity Actual End Date**' field (Figure 6-20).
8. Click the <**Save QPR Activity**> button to save all of the information entered about the activity.
   - This action returns you to the "Edit Performance Report" screen.
   - The <**Cancel**> button cancels any of the information entered into the report since the last save took place and returns the user to the "Edit Performance Report" screen with no changes.

6.2.2.4 Procedure: Prior Period Corrections

For Direct Benefit activities, DRGR will check the cumulative totals for total households from the race/ethnicity data and compare it to the cumulative totals by income level. Additionally, the system will check cumulative totals by tenure and by housing unit.

If there is an inconsistency, DRGR will display an error message.

- Example of an error message: **"Cumulative sum of income levels for 'Households - Total' must be equal to cumulative sum of 'Owner – Total' <Number>"**

In the example, the total number of households entered for income levels does not equal the total number of households entered for total 'owner' households. The user will likely need to resolve the error message through prior-period corrections. DRGR allows users to enter negative values in the QPR (when necessary) to make prior period connections.

Some common reasons for grantees to need to make prior period corrections are listed below:

- In the Action Plan during the quarter, a new benefit type was selected. However, in prior QPRs, the grantee has already reported accomplishment data.
- In the Action Plan during the quarter, benefit measures (i.e. owner/renter, single-family/multi-family) are added or modified. However, in prior QPRs, the grantee has already reported accomplishment data.
- Backing out incorrect data.

To make prior period corrections, follow the steps below.

1. Determine the correct **actual** cumulative data for the activity (regardless of what DRGR shows).
2. Determine the cumulative data showing in DRGR (based on all information entered into all prior QPRs to-date and including any information entered into the current QPR that is being corrected).
   - Use the '**View Cumulative Totals**' link in the "Edit Performance Report – Activity" screen (Figure 6-22); and/or
   - Use the Reports module – PerfReport 1 and PerfReport 6 – to view existing data QPR data in DRGR. See *Section 7 – Reports* for more information on accessing reports in DRGR.

Figure 6-22: View Cumulative Totals Link

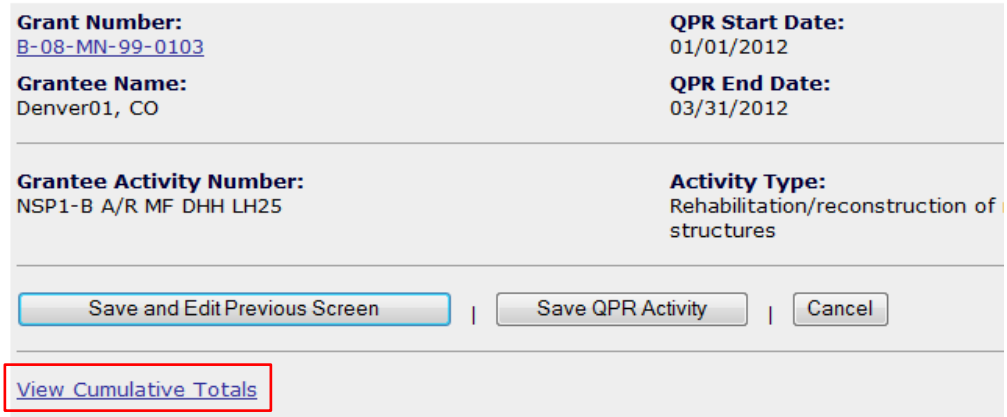


Figure 6-23 (continued): View Cumulative Totals Link

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	19/0	106/100	125/100	100
# Owner Households	0	0	0	19/0	106/10(	125/10(	100

Cumulative Race Total

	This Report Period						Cumulative Actual Total					
	Owner		Renter		Total Households		Owner		Renter		Total Households	
Direct Benefit (Households)	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino
White	0	0	0	0	0	0	100	38	0	0	100	38
Black/African American	0	0	0	0	0	0	10	1	0	0	10	1
Asian	0	0	0	0	0	0	4	0	0	0	4	0
American Indian/Alaskan Native	0	0	0	0	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander	0	0	0	0	0	0	1	0	0	0	1	0
Asian and White	0	0	0	0	0	0	1	0	0	0	1	0
Black/African American and White	0	0	0	0	0	0	2	0	0	0	2	0
Other multi-racial	0	0	0	0	0	0	7	1	0	0	7	1
Households Female	0		0		0		38		0		38	

3. Add the values in Step 1 and 2 (Figure 6-23) to determine the correction values that must be entered in the current QPR. provides an example of the use of the HUD Exchange prior period corrections tool

4. Enter the correction values (including negative values) from Step 3 (Figure 6-24) into the current QPR using the process described in 6.2.2.1 and 6.2.2.2.

   Note: The HUD Exchange includes an optional (but recommended) tool to automatically calculate correction values at: **https://www.hudexchange.info/resource/127/drgr-direct-benefit-data-entering-prior-period-corrections-for-breakout/**

   .

Figure 6-24: Prior Period Corrections tool – steps 1 and 2

Step 1. Identify and enter totals from grantee's own data tracking

HOUSEHOLDS	Rent	Own	Total		HOUSING UNITS	
Low Income		29	29		SF	146
Moderate Income		117	117		MF	
TOTAL		146	146		TOTAL	146

HOUSEHOLDS	Rent		Own		Total	
	Total	Hisp	Total	Hisp	Total	Hisp
White			119	40	119	40
Black/ African American			12	1	12	1
Asian			4		4	
American Indian / Alaska Native						
Native Hawaiian/ Other Pacific Islander			1		1	
Asian & White			8	1	8	1
American Indian / Alaska Native & White						
Native Hawaiian/ Other Pacific Islander & White						
Black/ African American & White			2		2	
American Indian / Alaska Native & Black/African American						
TOTAL	0	0	146	42	146	42
Female Headed Households			27		27	

Step 2. Identify data already in DRGR
(Use last approved QPR for cumulative totals)

Rent	Own	Total		HOUSING UNITS	
	29	29		SF	0
	106	106		MF	
	135	135		TOTAL	135

Rent		Own		Total	
Total	Hisp	Total	Hisp	Total	Hisp
		29		29	

Figure 6-25: Prior Period Corrections tool – step 3

Step 3. Automatically sums totals for grantee to enter into current QPR
(combines in-quarter data and prior period corrections)

Rent	Own	Total		HOUSING UNITS	
0	0	0		SF	146
0	11	11		MF	0
0	11	11		TOTAL	11

Rent		Own		Total	
Total	Hisp	Total	Hisp	Total	Hisp
0	0	119	40	119	40
0	0	12	1	12	1
0	0	4	0	4	0
0	0	0	0	0	0
0	0	1	0	1	0
0	0	8	1	8	1
0	0	0	0	0	0
0	0	0	0	0	0
0	0	2	0	2	0
0	0	0	0	0	0
0	0	146	42	146	42
0		-2		-2	

6.2.3 QPR Submission

After a QPR is added or edited, the QPR may be submitted for HUD review. The QPR Review Tools screen provides the following features to users to complete Quality Assurance/Quality Control of the Action Plan prior to submitting:

- Review Tools (Section 6.2.3.1)
- Review Active QPR Flags (Section 6.2.3.2)
- QPR Review Checklist (Section 6.2.3.3)
- QPR Submission Comments (Section 6.2.3.4)

Review Table 6-1 below for QPR Review Features Work Flow for both Grantee and HUD users.

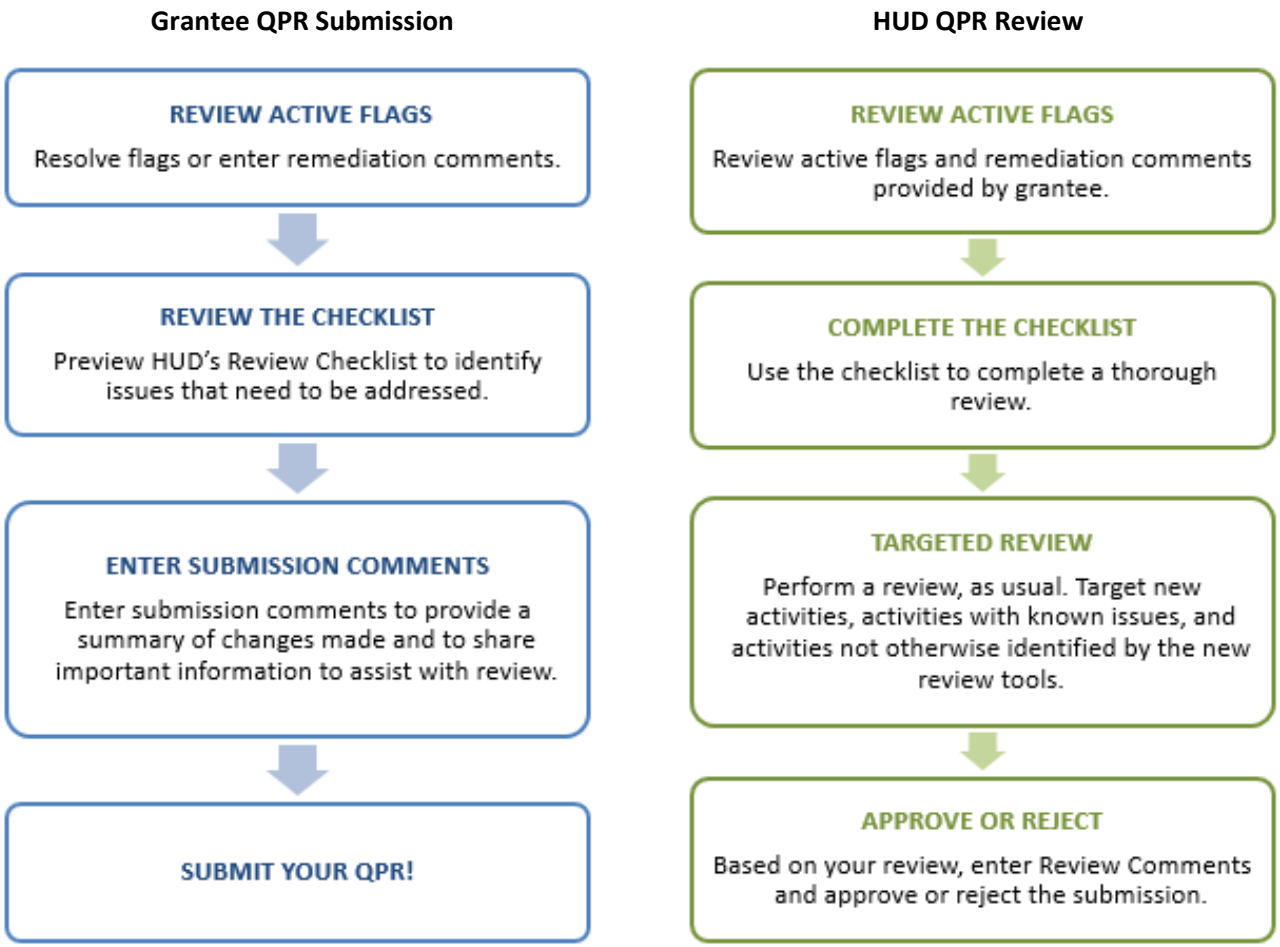
Table 6-1: QPR Review Features Work Flow

LOCATION GRANTEE	LOCATION HUD	FEATURE	FUNCTION
Edit QPR - Review Tools Screen	QPR Review Screen	Active Flags	Grantee users can see a summary of flags from the Review Tools function. Note that grantee users edit Flags from the HOME module. HUD reviewers can see all active flags related to the QPR and provide comments on those flags.
		QPR Review Checklist	Grantee users can view the checklists and see any auto-populated answers that may warrant fixes prior to QPR submission. HUD reviewers can edit the QPR Review Checklists. Comment boxes are provided and some questions are auto-completed. Additionally, some questions may be mandatory and will need to be completed prior to submission.
		View Functions	Grantee users can 'View' QPR Submission and Review Comments, Review Checklists, and Flags in the Review Tools link. HUD users can 'View' QPR Submission and Review Comments, Review Checklists, and Flags on the Review QPR screen.
Edit QPR Screen	N/A	Submission Comments	Grantee users can provide submission comments when they submit their QPR (no change). The submission comments will enable grantees to provide a summary of changes in the new or updated QPR, and/or convey any other information they deem relevant to the HUD reviewer.
N/A	Review QPR Screen	Review Comments	HUD reviewers can provide review comments on QPRs and activities to communicate information to grantees or request specific edits to the QPR prior to approving or rejecting the QPR.
		Supporting Documents	HUD reviewers can attach supporting documents to the QPR Review to supplement documentation or share information.
		QPR Status	HUD reviewers update the status of an QPR from the "Review QPR screen" (no change in Release 7.13).

Note: only DRGR users with the "Submit Action Plan" user role will be able to submit the QPR. See *Section 3 – Admin* for information on how to add roles to user profiles.

Grantees should use Review Tools to perform Quality Assurance/Quality Control prior to QPR submission (Section 6.2.3). HUD Users should use Review Tools to assist with QPR reviews (refer to (Section 6.2.4). Figure 6-25 shows the basic work flow of QPR submission and review.

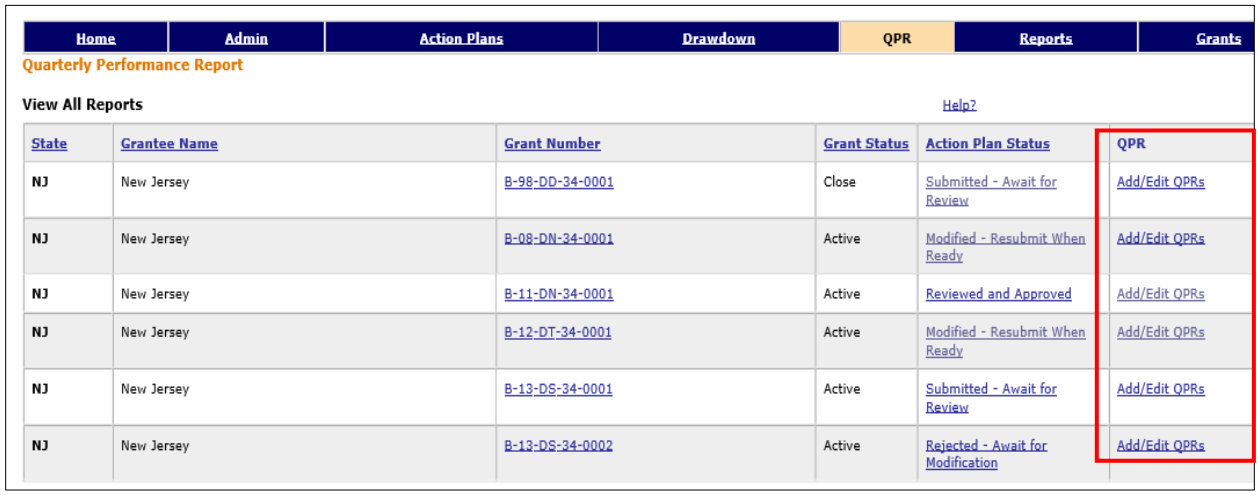
Figure 6-26: Grantee QPR Submission Work Flow



6.2.3.1 Procedure: Accessing Review Tools

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-26).

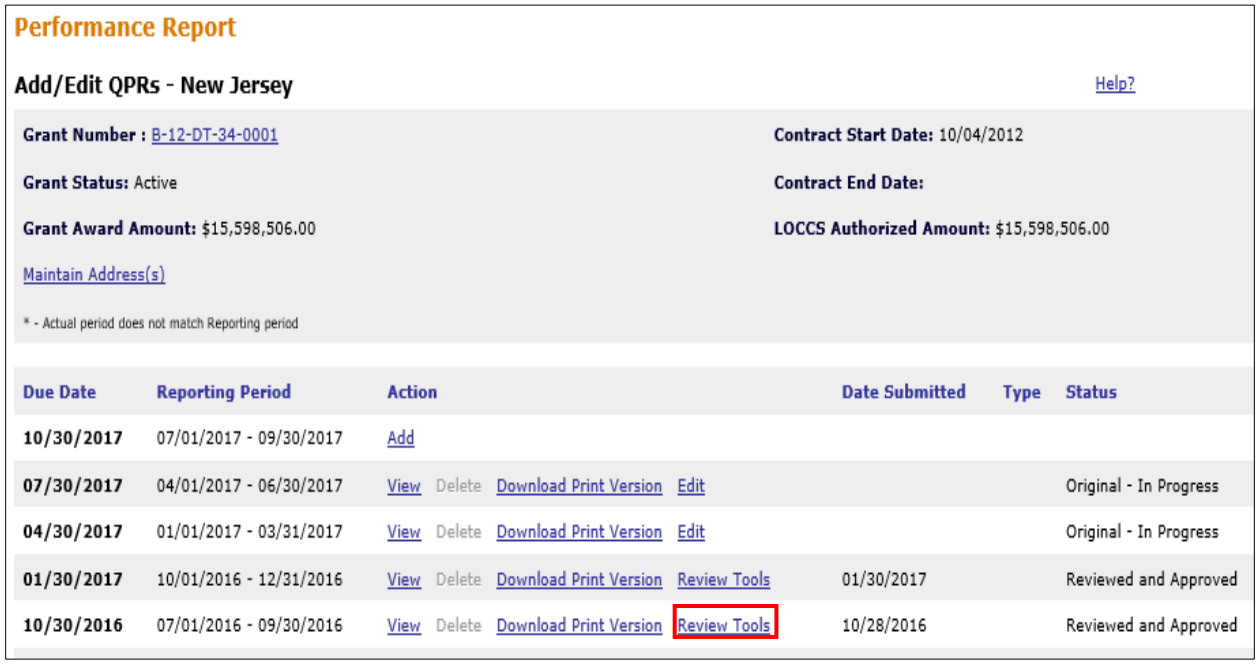
Figure 6-27: View All Reports



3. Once "Add/Edit QPR" screens loads, click <**Review Tools**> link on right of QPR submission (Figure 6-27). The "Review Tools" link is available for QPRs in "Reviewed and Approved" or "Submitted" status.

4. QPRs in "Original," "Modified," or "Rejected" status show the "Edit" link. Click on the "Edit" link to load the <**Edit QPR**> screen. The "Review Tools" link will appear on the left toolbar.

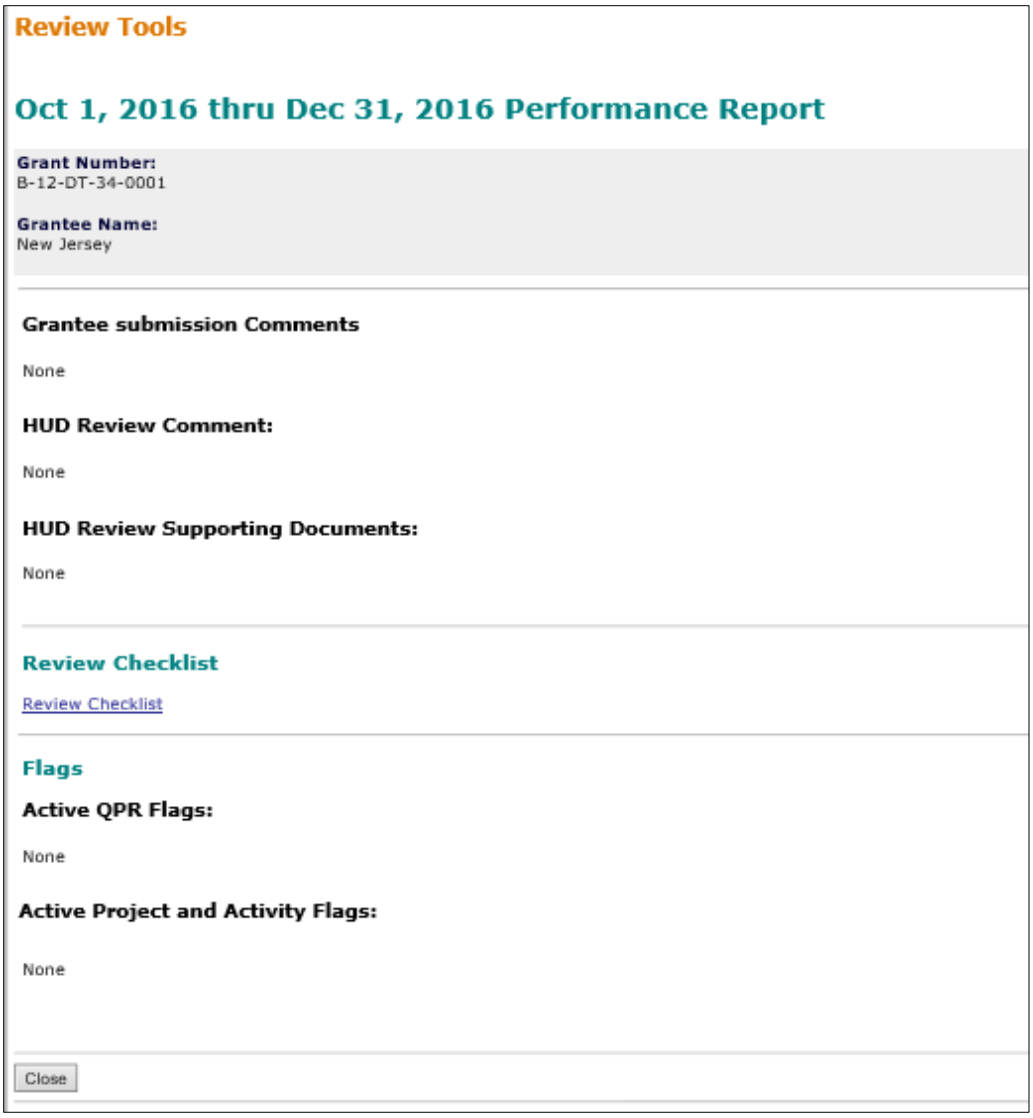
Figure 6-28: Performance Report Review Tools Option



5. Clicking on the "Review Tools" link reveals Grant Submission Comments, HUD Review Comments, HUD Review Supporting Documents, Review Checklist links and list of Active Flags (Figure 6-28).

   Note: Review Tool features are described in subsequent sections.

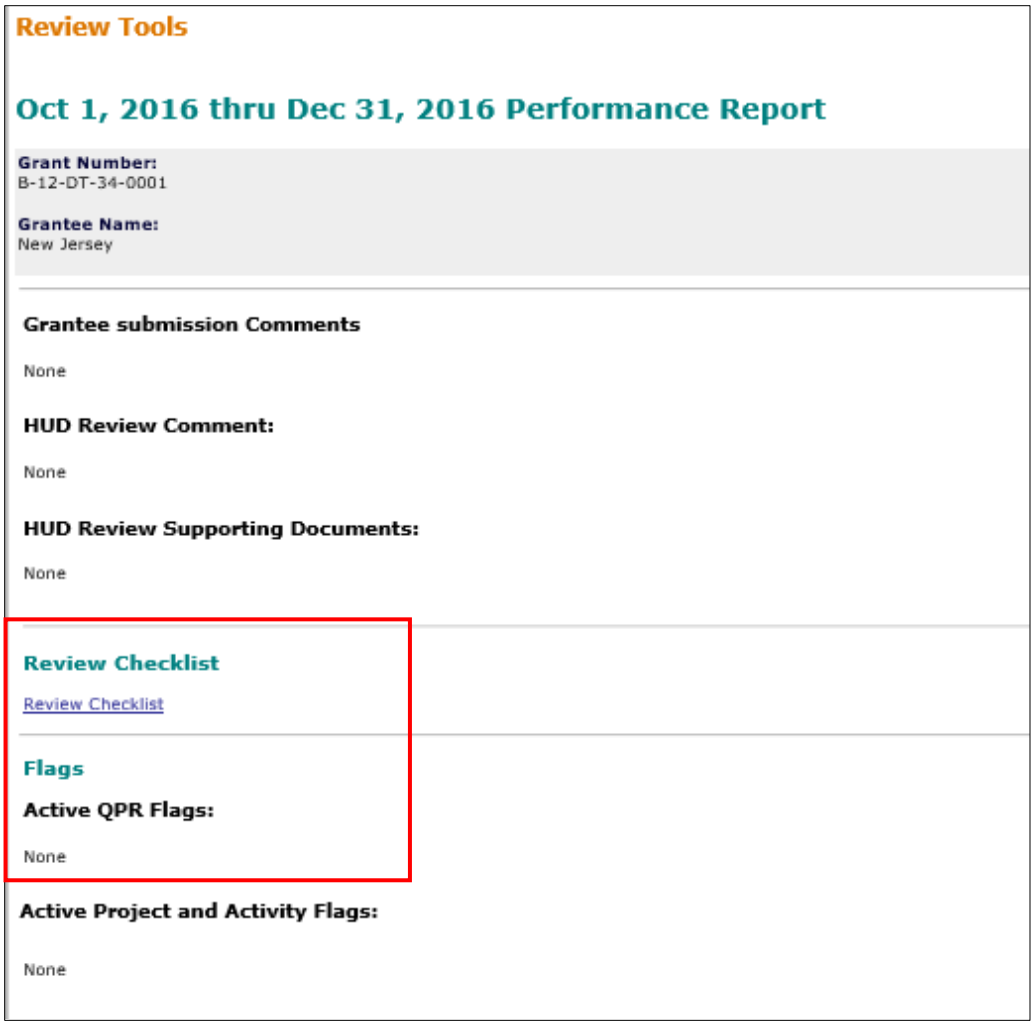
Figure 6-29: QPR Review Tools Screen



6.2.3.2 Procedure: Reviewing Active QPR Flags

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-26).
   - This action opens a default "Add/Edit QPR" screen.
3. Click <**Review Tools**> link on right of QPR submission (Figure 6-27) or click the "Edit" link to load the "Edit Performance Report" screen. The "Review Tools" link will appear on the left toolbar.
   - The <**Review Tools**> screen will load (Figure 6-29).
4. All "Active QPR Flags" and "Active Project and Activity Flags" are displayed towards the bottom of the "Review Tools" screen (Figure 6-29).

Figure 6-30: QPR Review Tools Screen - Flags



Note: Detailed steps and information related to resolving and remediating active flags is described in Section 2: Basic Navigation and Home Screen of the User Guide.

6.2.3.3 Procedure: Viewing/Downloading QPR Review Checklist

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-26).
   - This action opens a default "Add/Edit QPR" screen.
3. Click <**Review Tools**> link on right of QPR submission (Figure 6-27) or click the "Edit" link to load the "Edit Performance Report" screen. The "Review Tools" link will appear on the left toolbar.
   - The <**Review Tools**> screen will load (Figure 6-30).
4. Click "Review Checklist" to access new screen displaying the QPR Review Checklist (Figure 6-31).
5. Click **<Download>** to create PDF version of the QPR Review Checklist.

Figure 6-31: QPR Review Tools Screen - Flags

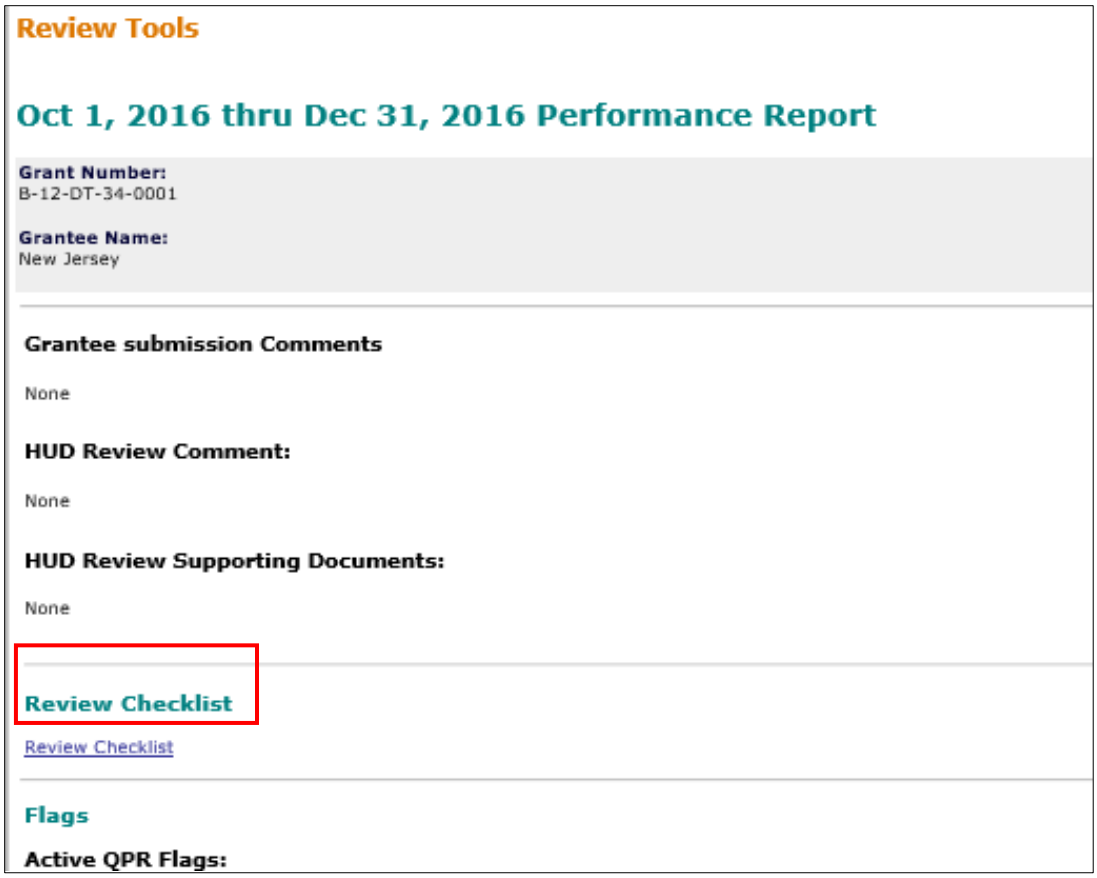
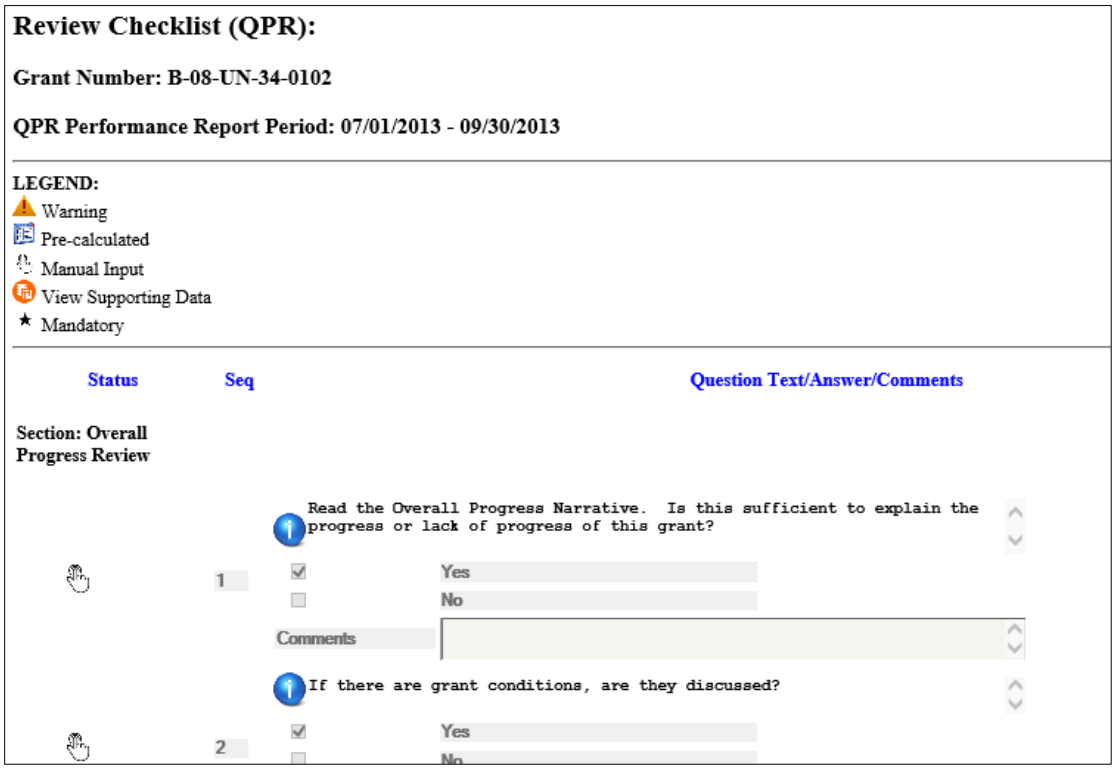


Figure 6-32: QPR Review Checklist with Icon Legend



The following describes Review Checklist icons:

- **Mandatory questions** are annotated on the edit checklist page with the following icon: (*). Review checklists cannot be submitted if the user has not entered mandatory questions.
- Questions that are mandatory and do not have a response will be displayed with a **warning icon** as follows: ( ).
- Some question responses may be **auto-computed** by the system and are depicted with the following icon: ( ). If a response to a checklist question is auto-computed, then the system displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
- **Non-auto-computed** question responses are depicted with the following icon: ( ).
- Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. **Auto-computed responses with supporting data** will be annotated with the following icon: ( ). On selection of this icon, the system will open a new window to display the supporting data.

6.2.3.4 Procedure: Submitting a QPR

Note: only DRGR users with the "Submit QPR" user role will be able to submit the Action Plan. See *Section 3 – Admin* for more information.

QPRs start in 'Original – In Progress' status when they are added to the system. They will stay in this status until submitted (when status changes to 'Submitted – Await for Review'). At this point, HUD CPD Representatives will review the QPR and either approve or reject it. If rejected, the QPR will be in a status of 'Rejected – Await for Modification' and will be available for grantee edits. Once edited, the status will change to 'Modified – Resubmit when Ready' until the QPR is resubmitted by the grantee. Once approved, a QPR will show a status of 'Reviewed and Approved'.

Follow the steps below to submit a QPR:

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen (Figure 6-32).

Figure 6-33: QPR View All Reports screen

Quarterly Performance Report

View All Reports Help?

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
VA	State of Virginia	B-96-DR-51-0001	Close	Original - In Progress	Add/Edit QPRs
VA	State of Virginia	B-98-DD-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-97-DU-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-98-DU-51-0001	Close	Modified - Resubmit When Ready	Add/Edit QPRs
VA	State of Virginia	B-05-DJ-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-08-DN-51-0001	Active	Reviewed and Approved	Add/Edit QPRs

2. Click <**Add/Edit QPRs**> next to the desired grant number.

   ➢ This action opens a default "Add/Edit QPR" screen (Figure 6-33).

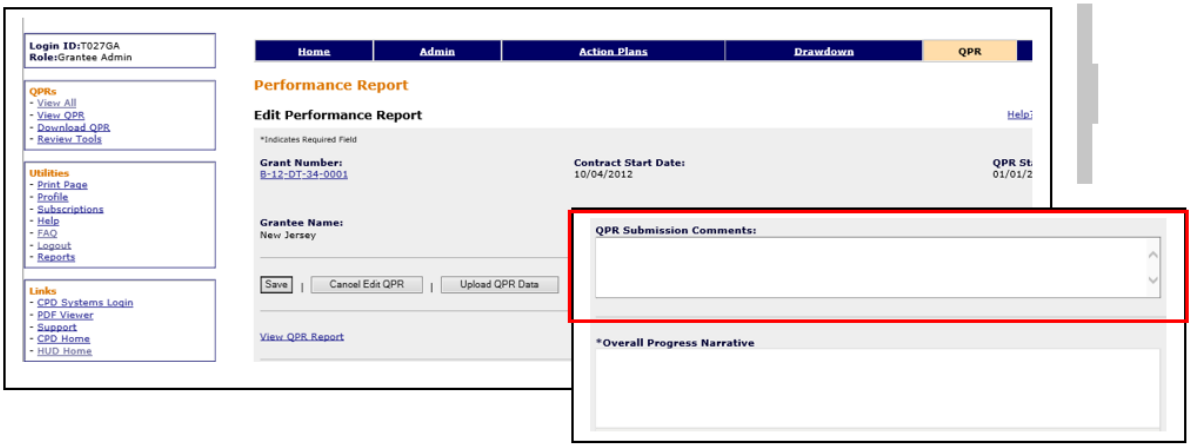
Figure 6-34: Add/Edit QPRs screen

3. Click the "Edit" link.

   ➢ This action opens the "Edit Performance Report" (Figure 6-34).

4. To enter QPR submission comments as a grantee user, enter narrative in "QPR Submission Comments" text box located at the bottom of the "Edit Performance Report" screen and click **<Save>** (Figure 6-33)**.**

Figure 6-35: QPR Submission Comments

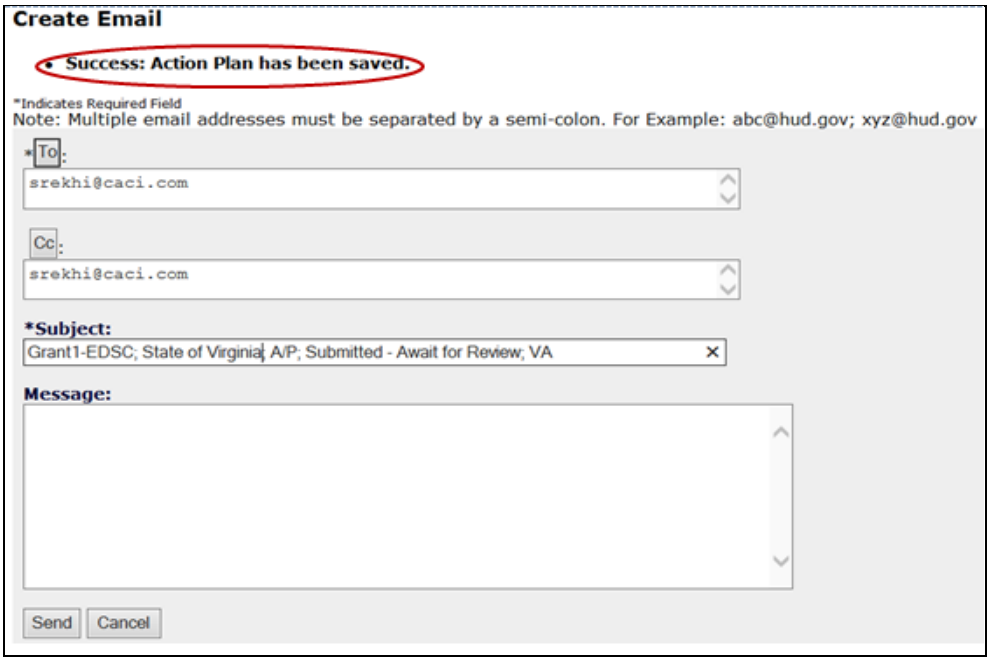


5. Click the <**Submit**> button to submit the QPR for HUD review (Figure 6-35).

   ➢ This action opens the "Create Email" screen with a "success" message, which allows the user to email reviewers or other grantee users (Figure 6-36).

Figure 6-36: QPR Add Performance Report screen

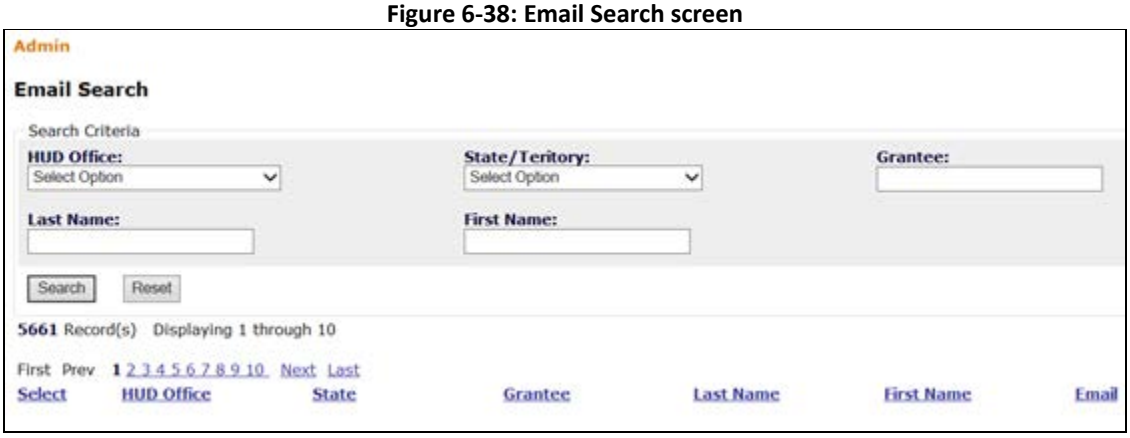
Figure 6-37: Create email screen



6. Select the <**To**> or <**Cc**> button to add additional recipients to the email.

   - This action takes the user to the "Email Search" page (Figure 6-37). On this page, users are able to search for additional recipients to add to the email.

Figure 6-38: Email Search screen



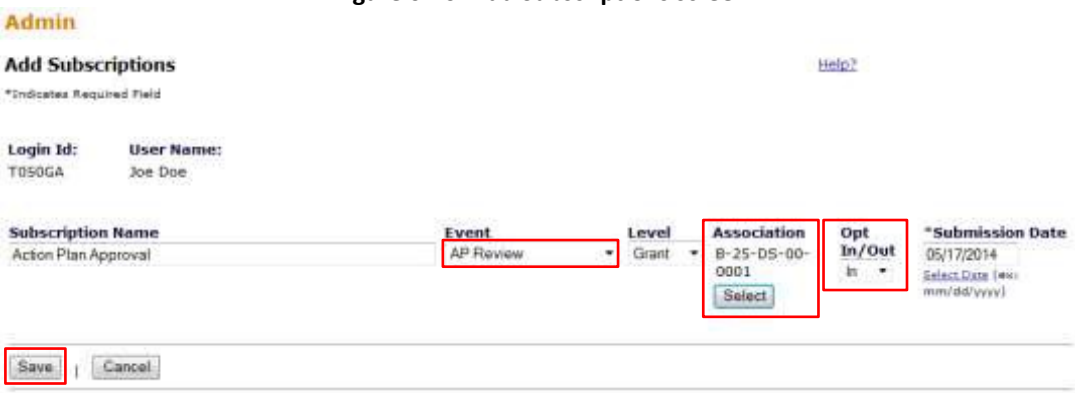
In lieu of being added to an email for notification of QPR submission, DRGR users can create a subscription to be notified each time a QPR is submitted for review. This process is summarized below:

1. Click the <**Subscriptions**> link in the Utilities menu (Figure 6-38). This action opens the "Manage Subscriptions" page.

Figure 6-39: Subscriptions

2. On the "Manage Subscriptions page, click <**Add Subscription**>. This action opens the "Add Subscription" screen (Figure 6-39).

Figure 6-40: Add Subscriptions screen



3. On the "Add Subscriptions" screen, the user will need to do the following to add an QPR subscription:

   - Enter a name for the subscription.
   - Select <**QPR Review**> from the 'Event' dropdown menu.
   - Select <**Grant**> from the 'Level' dropdown menu.
   - Associate the applicable grant number with the subscription by clicking the <**Select**> button, searching for the grant and clicking the <**Assign Selected Grant**> button on the "Grant Search" screen.
   - Selecting <**In**> under the 'Opt In/Out' heading.
   - Enter a date for the subscription to begin under the 'Submission Date' heading.
   - Click <**Save**> to complete the subscription.

6.2.4 HUD Review of QPR

HUD Reviewers must review and reject or approve submitted QPRs. HUD review will be specific to the grant appropriation and will focus on compliance with grant requirements, accuracy of information and will also be a means for the HUD Reviewer to understand how the grant program is progressing.

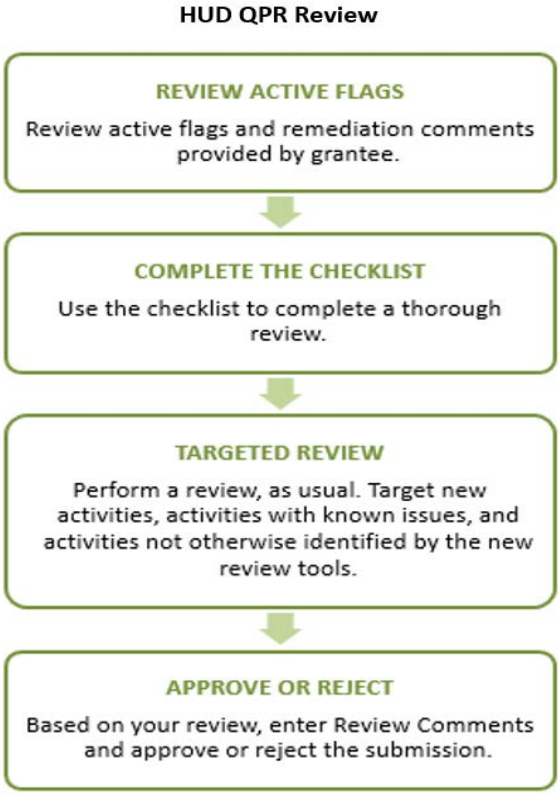
As part of this review, HUD Reviewers will utilize the Review Screen and "Review Tools" feature to access the QPR Checklist, provide comments on active activities and flags, enter overall review comments, and attach supporting documents. Features of the Review Tools are listed below:

Accessing Review Tools (Section 6.2.4.1)

- Complete QPR Checklist (Section 6.2.4.2)
- Entering QPR Review Comments (Section 6.2.4.3)

The following chart includes HUD QPR Submission Review tips (Figure 6-40).

Figure 6-41: HUD QPR Review Work Flow



6.2.4.1 Procuedure: Accessing Review Screen and Review Tools

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-41).
3. Once "Add/Edit QPR" screens loads, <**Review Tools**> will appear for every QPR that is not in "Submitted – Awaiting Review" status (Figure 6-42).
4. For QPRs in "Submitted – Awaiting Review" status, click on the "Review" link to load the <**Review QPR**> screen. The "Review Tools" link will appear on the left toolbar. Figure 6-43 shows the Review Tools screen. Figure 6-44 shows the Review screen.

Figure 6-42: View all Reports for HUD Reviewers

Home | Admin | Action Plans | Drawdown | QPR | Reports | Grants

Quarterly Performance Report

View All Reports

Help?

1 Page 2 >

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
NJ	New Jersey	B-98-DD-34-0001	Close	Submitted - Await for Review	Review QPRs
NJ	New Jersey	B-08-DN-34-0001	Active	Modified - Resubmit When Ready	Review QPRs
NJ	Bergen County, NJ	B-08-UN-34-0101	Active	Modified - Resubmit When Ready	Review QPRs
NJ	Jersey City, NJ	B-08-MN-34-0101	Active	Modified - Resubmit When Ready	Review QPRs
NJ	Newark, NJ	B-08-MN-34-0102	Active	Reviewed and Approved	Review QPRs
NJ	Paterson, NJ	B-08-MN-34-0103	Active	Reviewed and Approved	Review QPRs
NJ	Union County, NJ	B-08-UN-34-0102	Active	Submitted - Await for Review	Review QPRs
NJ	Newark, NJ	B-09-CN-NJ-0009	Active	Reviewed and Approved	Review QPRs
NJ	Housing Authority of Camden City	B-09-CN-NJ-0010	Active	Reviewed and Approved	Review QPRs
NJ	Camden Redevelopment Agency	B-09-CN-NJ-0008	Active	Modified - Resubmit When Ready	Review QPRs

Figure 6-432: QPR Review Tools for HUD Reviewers

Performance Report

Review QPRs - Union County, NJ

Help?

Grant Number : B-08-UN-34-0102

Contract Start Date: 03/09/2009

Grant Status: Active

Contract End Date:

Grant Award Amount: $2,601,755.00

LOCCS Authorized Amount: $2,601,755.00

* - Actual period does not match Reporting period

Due Date	Reporting Period	Action				Date Submitted	Type	Status
10/30/2014	07/01/2014 - 09/30/2014	View	Delete	Download Print Version	Review Tools			Original - In Progress
07/30/2014	04/01/2014 - 06/30/2014	View	Delete	Download Print Version	Review	09/11/2014		Submitted - Await for Review
04/30/2014	01/01/2014 - 03/31/2014	View	Delete	Download Print Version	Review	09/11/2014		Submitted - Await for Review
01/30/2014	10/01/2013 - 12/31/2013	View	Delete	Download Print Version	Review	09/11/2014		Submitted - Await for Review
10/30/2013	07/01/2013 - 09/30/2013	View	Delete	Download Print Version	Review Tools	10/31/2013		Reviewed and Approved

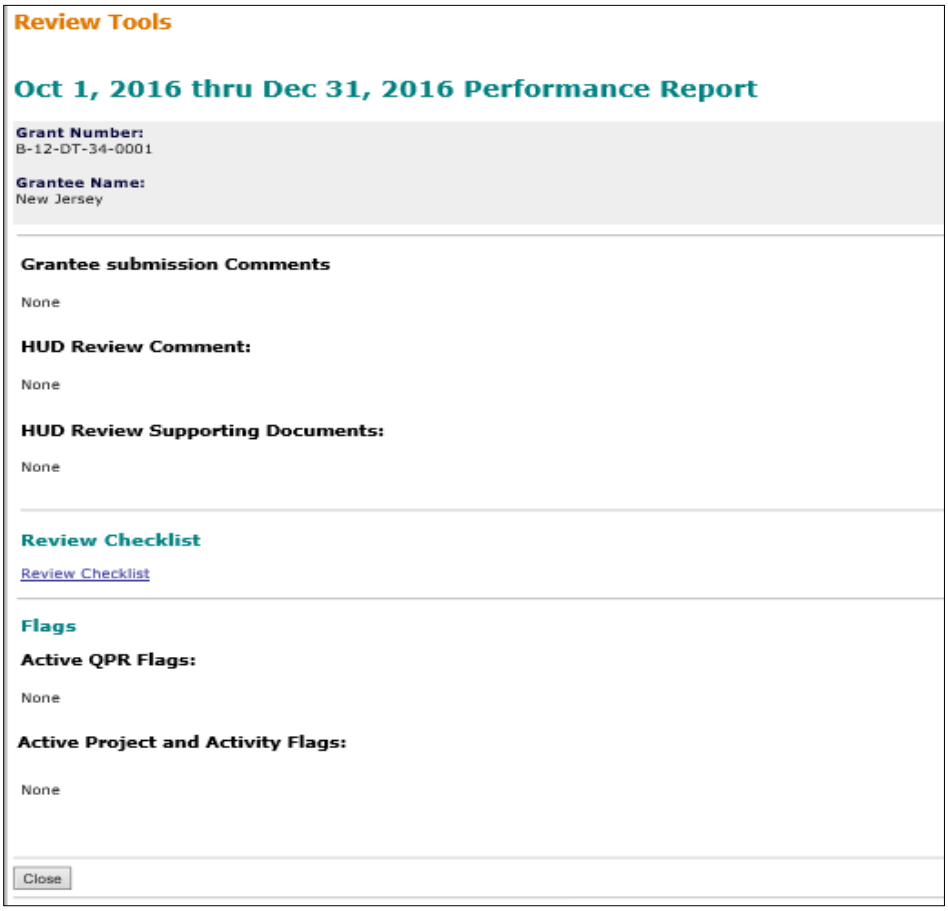
Note: HUD users are able to access the View QPR screen and a PDF version of the QPR to aid in their review. HUD users must be assigned to the grant and the QPR must be in "Submitted- Await for Review" status in order to use the following "Review Tool" features (Figure 6-43).

Difference between "Review Screen" and "Review Tools"

Review Screen: Standard screen where HUD Users approve/reject QPR and access/perform review functions.

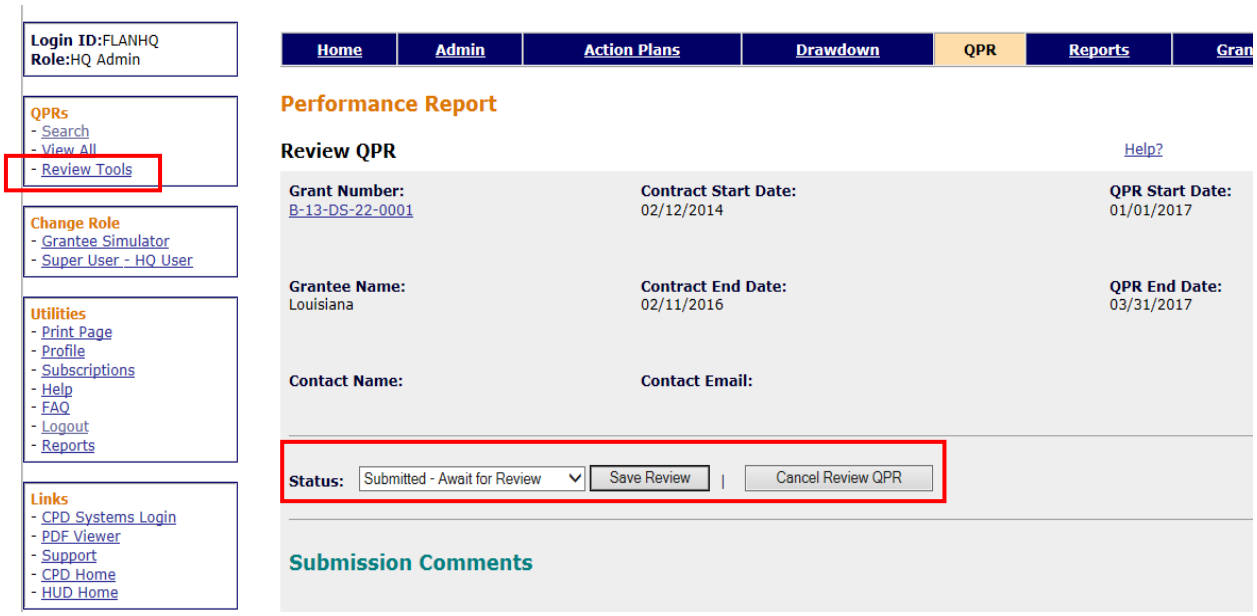
Review Tools: "View Only" summary of all grantee and HUD user review actions.

Figure 6-44: QPR Review Tools Screen



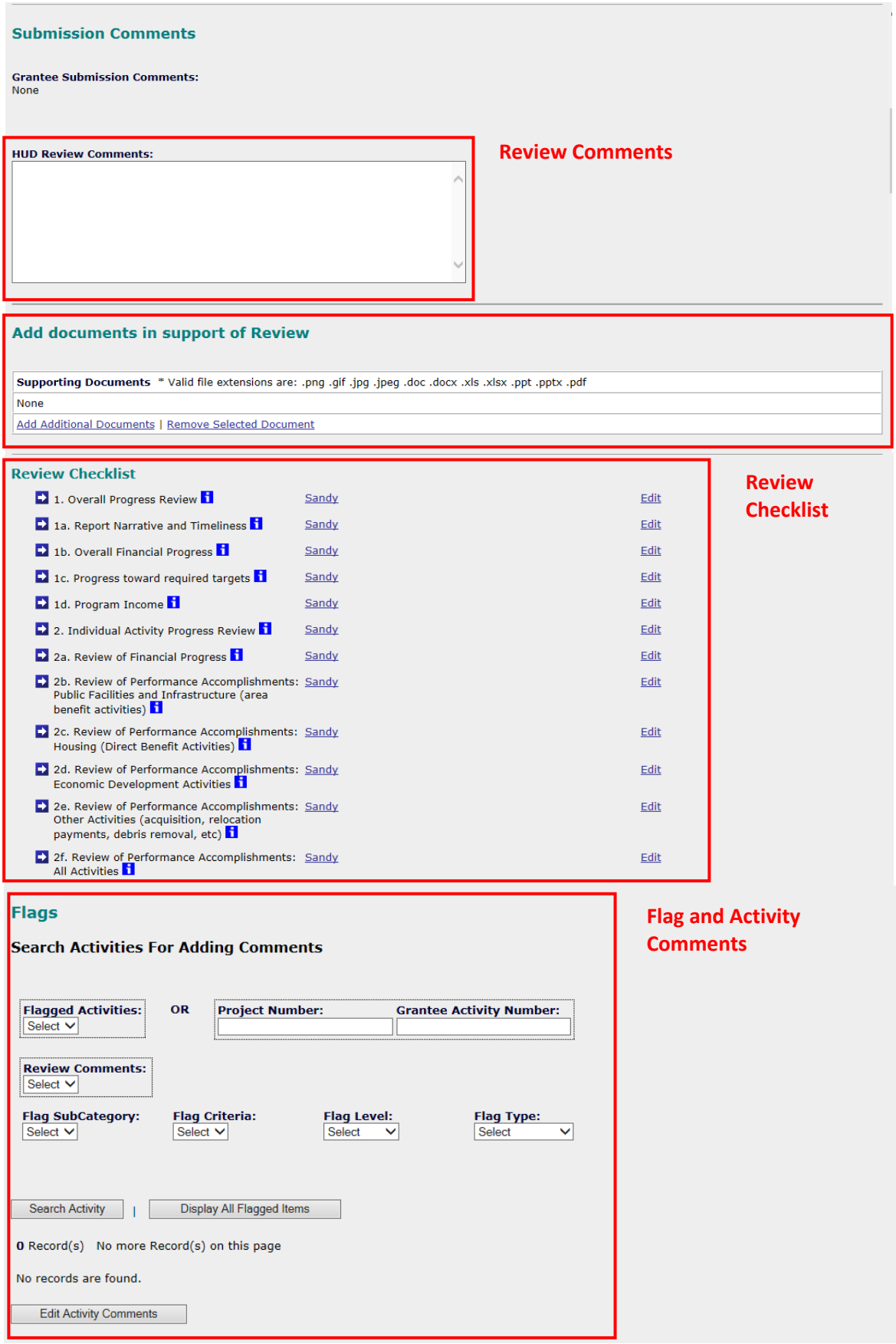
Review Tools link

Figure 6-45: QPR Review Screen



Update Status

Figure 6-46: QPR Review Screen continued



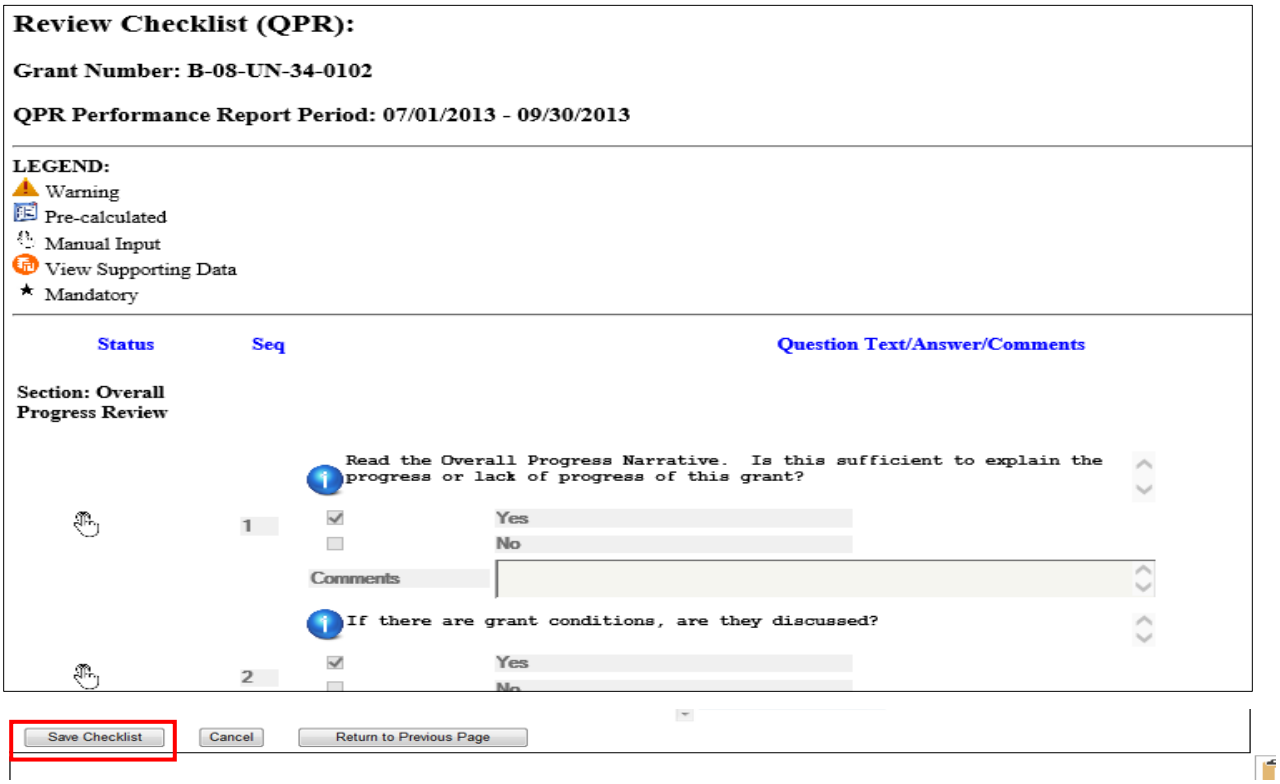
6.2.4.2 Procuedure: Reviewing Active QPR Flags

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-41).
   - This action opens the "Review QPRs" scree (Figure 4-42).
3. For QPRs in "Submitted – Awaiting Review" status, click on the "Review" link to load the <**Review QPR**> screen.
   - This action opens the "Review QPR" screen (Figure 4-44).
4. To view active flags, click on the "Review Tools" link (Figure 4-43).
5. To insert comments on individual flags or activities, use the search feature on the review screen and click "Edit Activity Comments" (Figure 4-44).

6.2.4.3 Procuedure: Completing QPR Review Checklist

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-41).
   - This action opens the "Review QPRs" scree (Figure 4-42).
3. For QPRs in "Submitted – Awaiting Review" status, click on the "Review" link to load the <**Review QPR**> screen.
   - This action opens the "Review QPR" screen (Figure 4-44).
4. Select the <**Edit**> link next to each review section.
   - This action opens the "Review Checklist – Section" screen (Figure 6-45) where the HUD Reviewer can complete the checklist.
5. Answer the questions and enter review comments. Some question may be auto-answered and cannot be edited. HUD users, however, can enter comments.
6. Click <**Save Checklist**> after completing the Review Checklist.

Figure 6-45: Review Checklist



The following describes Review Checklist icons:

- **Mandatory questions** are annotated on the edit checklist page with the following icon: (*). Review checklists cannot be submitted if the user has not entered mandatory questions.
- Questions that are mandatory and do not have a response will be displayed with a **warning icon** as follows: ( ).
- Some question responses may be **auto-computed** by the system and are depicted with the following icon: ( ). If a response to a checklist question is auto-computed, then the system displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
- **Non-auto-computed** question responses are depicted with the following icon: ( ).
- Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. **Auto-computed responses with supporting data** will be annotated with the following icon: ( ). On selection of this icon, the system will open a new window to display the supporting data.

6.2.4.4 Procedure: Approving/Rejecting QPR

1. Log into DRGR and accept the 'Disclaimer.' On the Home screen, select the <**QPR**> link in the navigation bar.
   - This action opens a default "View All Reports" screen.
2. Click <**Add/Edit QPRs**> next to the desired grant number (Figure 6-41).
   - This action opens the "Review QPRs" scree (Figure 4-42).

3. For QPRs in "Submitted – Awaiting Review" status, click on the "Review" link to load the <**Review QPR**> screen.
   - This action opens the "Review QPR" screen (Figure 4-44).
4. Change the status of the QPR to "Reviewed and Approved" or Rejected Awaiting Modification" and click <**Save Review**>.

6.2.5 View / Download / Print QPR

All users can view and download QPRs. Downloading the QPR can be an easy way for grantees to share the QPR with community stakeholders and the public (e.g. by posting the downloaded QPR on the grantee's website).

6.2.5.1 Procedure: View QPR

To view a QPR, follow the steps below.

1. Following login and acceptance of the "Disclaimer", click the <**QPR**> tab in the navigation bar.
   - This action opens the "View All Reports" screen (Figure 6-46).

Figure 6-46: View All Reports screen

Quarterly Performance Report

View All Reports Help?

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
VA	State of Virginia	B-96-DR-51-0001	Close	Original - In Progress	Add/Edit QPRs
VA	State of Virginia	B-98-DD-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-97-DU-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-98-DU-51-0001	Close	Modified - Resubmit When Ready	Add/Edit QPRs
VA	State of Virginia	B-05-DJ-51-0001	Close	Reviewed and Approved	Add/Edit QPRs
VA	State of Virginia	B-08-DN-51-0001	Active	Reviewed and Approved	Add/Edit QPRs

2. Click on the "Add/Edit" link in the 'QPR' column.
   - This action opens the "Add/Edit QPRs" screen (Figure 6-47).

Figure 6-47: Add/Edit QPRs – (Grantee Name) screen

Quarterly Performance Report

Add/Edit QPRs - GranteeP1, ESDC

Help?

Grant Number: Grant1-ESDC

Contract Start Date: 09/15/2003

Grant Status: Active

Contract End Date:

Grant Amount: $783,000,000.00

Due Date	Date Submitted	Action	Status	Submitter
01/30/2011		Add		
10/30/2010		View Download Print Version Edit	Original - In Progress	
07/30/2010	08/05/2010	View Download Print Version	Reviewed and Approved	
04/30/2010	06/04/2010	View Download Print Version	Reviewed and Approved	
01/30/2010	04/08/2010	View Download Print Version	Reviewed and Approved	
10/30/2009	11/30/2009	View Download Print Version	Reviewed and Approved	

3. To View a Quarterly Performance Report, click the <**View**> link in the 'Action' column for the QPR desired.
   - This action opens the "Performance Report" view screen for the quarter, including current and cumulative totals for financial and performance measure information (Figure 6-48 and Figure 6-49).

Figure 6-48: Quarterly Report View screen

Jul 1, 2010 thru Sep 30, 2010 Performance Report

Grant Number:
Grant1-ESDC

Obligation Date:
09/15/2003

Grantee Name:
GranteeP1, ESDC

Award Date:

Grant Amount:
$783,000,000.00

Contract End Date:

Grant Status:
Active

Reviewed By HUD:
Original - In Progress

QPR Contact:
No QPR Contact Found

Disasters:

Declaration Number
FEMA-DR-1391-NY

Disaster Damage:

The Lower Manhattan Development Corporation was created in the aftermath of September 11, 2001 by Governor Pataki and then-Mayor Giuliani to help plan and coordinate the rebuilding and revitalization of Lower Manhattan, defined as everything south of Houston Street. The LMDC is a joint State-City corporation governed by a 16-member Board of Directors, half appointed by the Governor of New York and half by the Mayor of New York. LMDC is charged with ensuring Lower Manhattan recovers from the attacks and emerges even better than it was before. The World Trade Center attacks resulted in a staggering loss of life and extensive physical destruction to Lower Manhattan. Approximately 30 million square feet of commercial space was damaged or eliminated, and seven buildings in the World Trade Center site were completely leveled. Critical transportation infrastructure was disrupted or obliterated, including the PATH station, the 1/9 subway line and sections of Route 9A and Church Street. Vehicular access to the area south of Canal Street was prohibited for seven days. As a result of the tragedy, residential occupancy rates in the immediate region dropped to 60%, over 100,000 jobs were displaced, and small and large businesses struggled to maintain viability. The World Trade Center attacks inflicted widespread destruction upon the energy (electric, gas, and steam) and telecommunications utility infrastructure, resulting in extensive disruptions in service to

Figure 6-49: View QPR Cumulative Totals section

Grantee Activity ID:
BC-14A

Projected Start Date:
08/20/2005

Activity Category:
Rehabilitation/reconstruction of residential structures

Projected End Date:
08/19/2007

Activity Status:
Under Way

National Objective:
Low/Mod

Responsible Organization:
Brevard County

	This Report Period	To Date
Total Projected Budget from All Sources	N/A	935,000
Total CDBG Disaster Recovery Grant Funds Budgeted	N/A	935,000
Obligated CDBG DR Funds	0	935,000
Expended CDBG DR Funds	30,000	60,000
Match Contributed	0	0
Program Income Received	0	0

Performance Measures

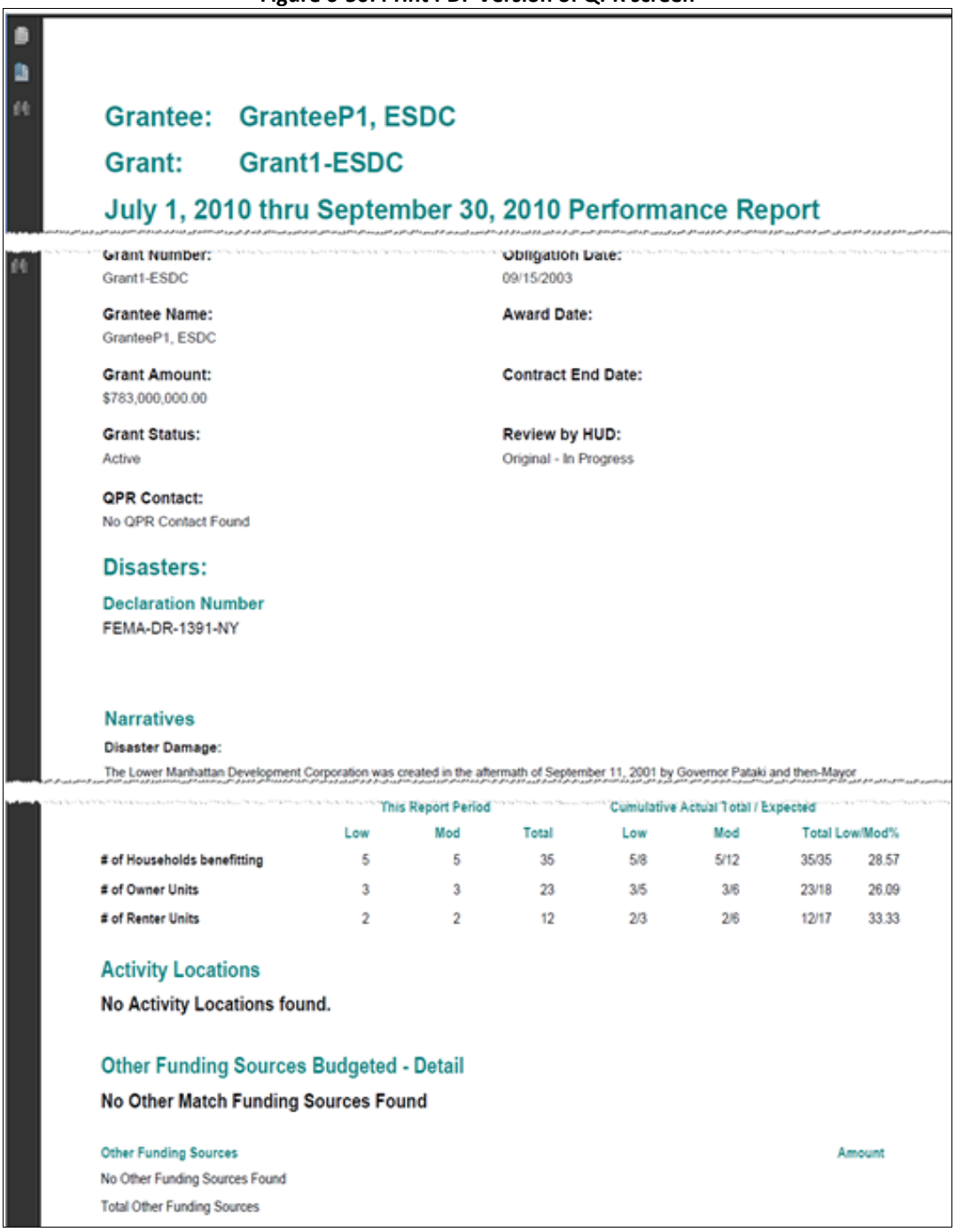
	This Report Period			Cumulative Actual Total / Expected		
	Low	Mod	Total	Low	Mod	Total
# of housing units	0	0	0	0/0	0/0	0/34
# of Households benefitting	0	0	0	0/0	0/34	0/34

6.2.5.2 Procedure: Download / Print QPR

To download a PDF print version of a QPR, follow the steps below:

1. Follow Steps 1 and 2 in Section 6.2.4.1.
   - These steps result in the "Add/Edit QPRs" screen being displayed.
2. Click the <**Download Print Version**> link in the 'Action' column.
   - This action opens the QPR in PDF printable format (Figure 6-50).

Figure 6-50: Print PDF Version of QPR screen



Grantee: GranteeP1, ESDC

Grant: Grant1-ESDC

July 1, 2010 thru September 30, 2010 Performance Report

Grant Number: Grant1-ESDC

Obligation Date: 09/15/2003

Grantee Name: GranteeP1, ESDC

Award Date:

Grant Amount: $783,000,000.00

Contract End Date:

Grant Status: Active

Review by HUD: Original - In Progress

QPR Contact: No QPR Contact Found

Disasters:

Declaration Number

FEMA-DR-1391-NY

Narratives

Disaster Damage:

The Lower Manhattan Development Corporation was created in the aftermath of September 11, 2001 by Governor Pataki and then-Mayor

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households benefitting	5	5	35	5/8	5/12	35/35	28.57
# of Owner Units	3	3	23	3/5	3/6	23/18	26.09
# of Renter Units	2	2	12	2/3	2/6	12/17	33.33

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

6.2.6 Additional Function - Maintain Address(s)

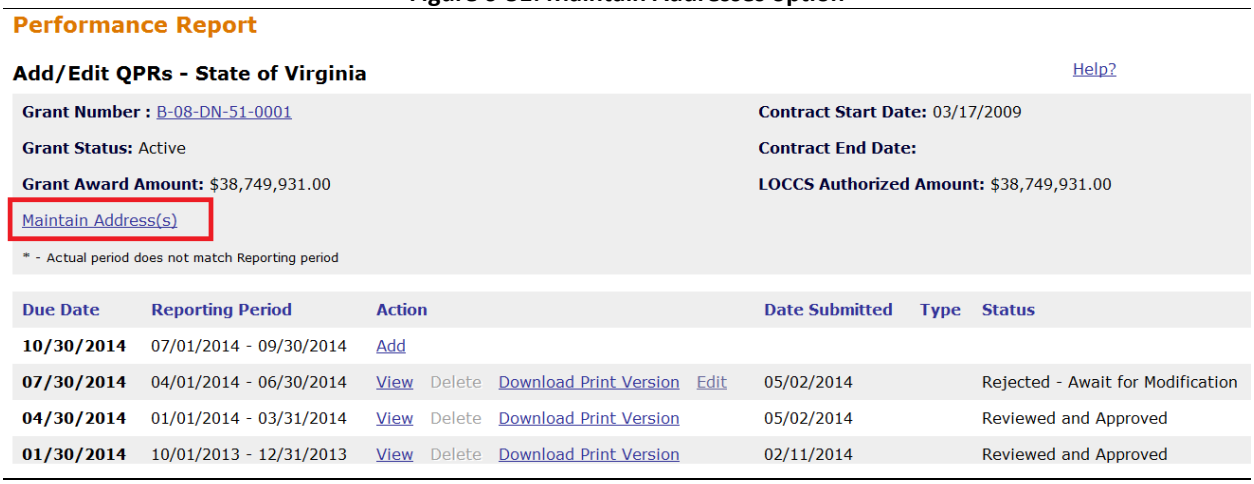
As discussed in Section 6.2.2.2 and 6.2.2.3, addresses can be entered on the edit activity screen. However, address data can also be added, deleted and moved across performance reports regardless of performance report status from the "Add/Edit QPRs" screen. When addresses are added or managed from this screen, performance reports are not required to be submitted or approved again.

6.2.6.1 Procedure: Add Address

To add addresses using the 'Maintain Address' link, follow the steps below:

1. Following login and acceptance of the "Disclaimer", click the <**QPR**> tab in the navigation bar.
   - ➢ This action opens the "View All Reports" screen.
2. Click the "Add/Edit" link in the 'QPR' column.
   - ➢ This action opens the "Add/Edit QPRs" screen (Figure 6-51).

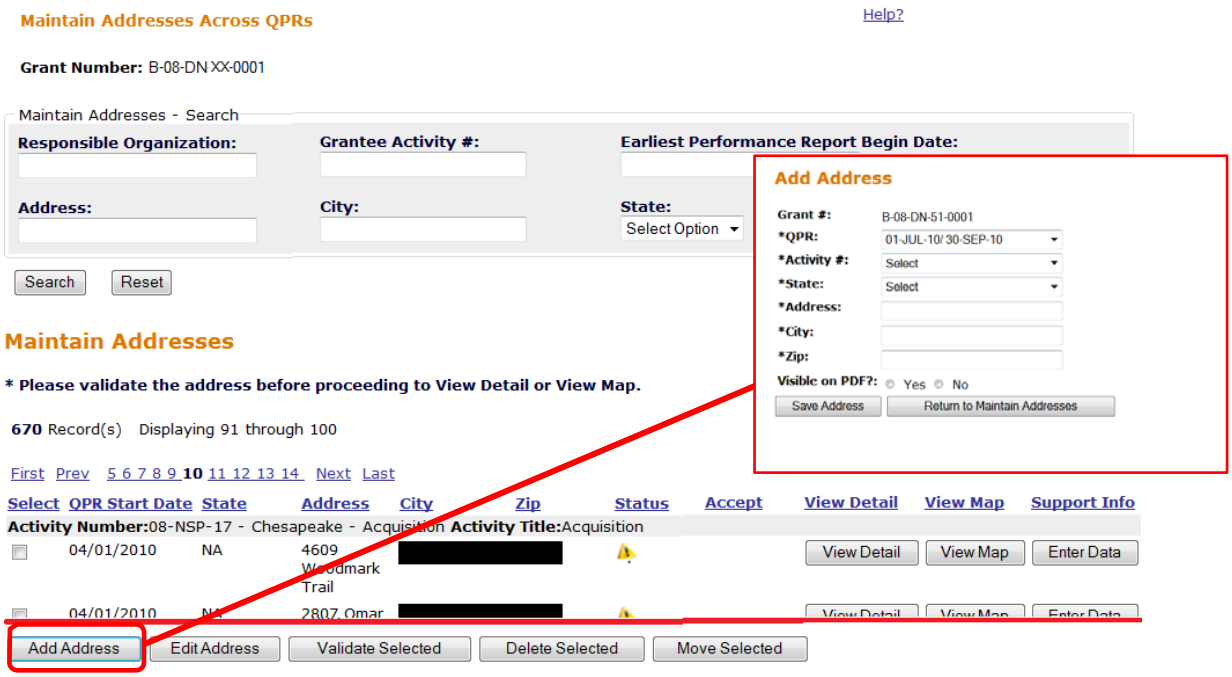
Figure 6-51: Maintain Addresses option



3. Click the <**Maintain Address**> link.
   - ➢ This action opens the "Maintain Addresses Across QPRs" search screen.
4. Optional: enter search criteria or leave search fields blank and click the <**Search**> button.
   - ➢ This action will refresh the screen and show all matching search results.
5. Click the <**Add Address** > button.
   - ➢ This action opens the "Add Address" screen (Figure 6-52).
6. Enter all address information on the "Add Address" screen.

   Note: Because this add address method is used across QPRs, the user must specify the 'QPR' period and 'Activity #', in addition to entering address information.
7. Click the <**Save Address**> button to save the new address.
8. Once the address is saved, users can select saved addresses and 'Edit', 'Validate', 'Delete' and 'Move' addresses using the buttons on the "Maintain Addresses Across QPRs" screen.

Figure 6-52: Add Address screen



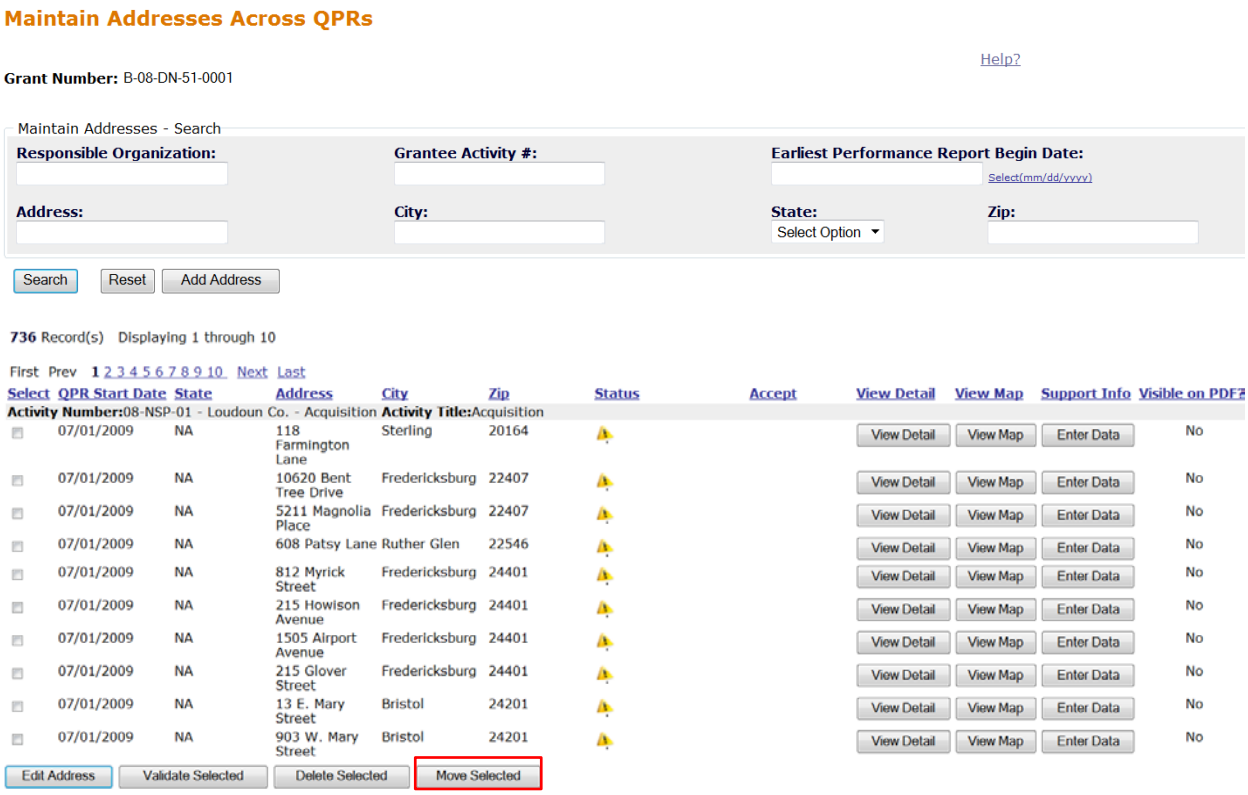
6.2.6.2 Procedure: Move Address across Performance Reports

The Maintain Address functionality allows addresses to be moved from one QPR reporting period to another. This may be useful to make corrections for an address entry without entering a duplicate address for an activity.

To move an address, follow the steps below:

1. Follow steps 1-3 in Section 6.5.2.1.
   - This action opens the "Maintain Addresses Across QPRs" search screen (Figure 6-53).

Figure 6-53: Maintain Addresses across QPRs



2. Enter search criteria to locate the address to be moved, or leave all search fields blank.
3. Click the <**Search** > button.
   - ➢ The search results display on the "Maintain Addresses Across QPRs" search screen (Figure 6-57).
4. Select an address from the search results and click the <**Move Selected**> button to move this address to another Performance Report.
   - ➢ This action opens the "Move Selected Address" screen (Figure 6-54).

Figure 6-54: Move Selected Address

5. Select a QPR (to identify where to move the address to) from the dropdown list.
6. Click the <**Save**> button.

6.2.6.3 Procedure: Add Post Closeout Address Support Info

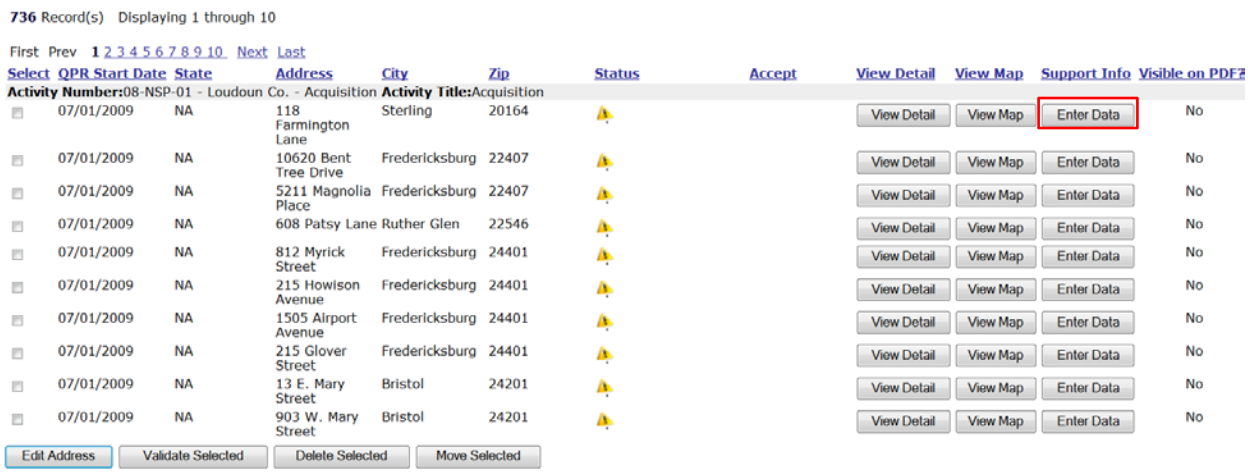
With certain grant programs, such as NSP, grantees are required to submit reports on the use of program income (PI) and document the affordability periods for certain properties funded under the NSP program after grant closeout.

DRGR supports entering post-closeout address information on individual 'Closeout' QPRs or across QPRs using the 'Maintain Address' functionality. Grantees are able to provide required information on affordability periods as well as the Activity Type and National Objective for the end use of a property.

To enter post-closeout address support information via 'Maintain Address', follow the steps below:

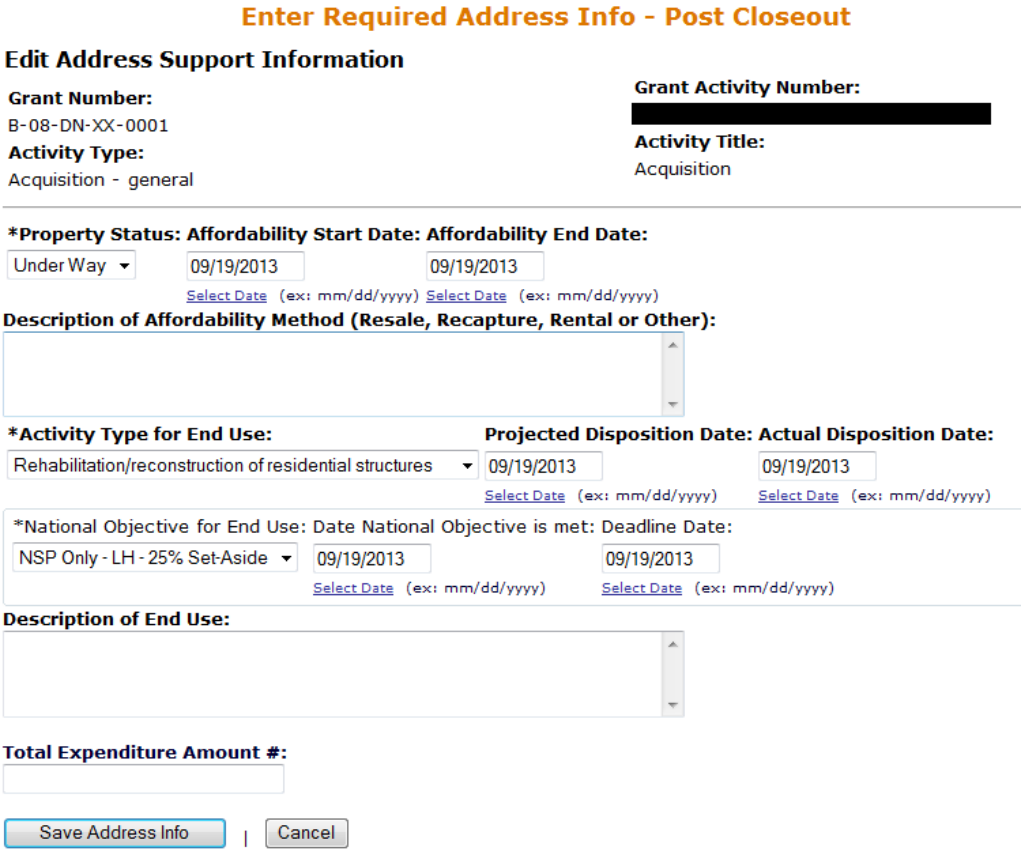
1. Follow steps 1-3 in Section 6.5.2.1.
   - ➢ This action opens the "Maintain Addresses Across QPRs" search screen.
2. Enter search criteria to locate the desired address for reporting.
3. Click the <**Search**> button.
   - ➢ The search results display on the "Maintain Addresses Across QPRs" search screen (Figure 6-55).

Figure 6-55: Maintain Address search results



4. Click the <**Enter Data**> button.
   - ➢ This action opens the "Edit Address Support Information" screen (Figure 6-56).

Figure 6-56: Edit Address Support Information screen



5. Required: Select 'Property Status (affordability period)', 'Activity Type for End Use' and 'National Objective for End Use' information from the respective dropdown menus and enter associated dates.
6. Optional but recommended: Enter a 'Description of End Use' narrative and 'Total Expenditure Amount'.
7. Click the <**Save Address Info**> button to save the address support information.

Appendix 1 – Closeout Checklists

DRGR supports the following workflow for HUD users to review and closeout a grant:

1. CPD Reps can enter the closeout checklist, provide comments, and attach relevant documents during the closeout document review.
2. CPD Reps notify the appropriate Field Office Managers and Super Users that the Review Checklist has been completed and is ready for their review.

   Note: CPD Reps cannot edit the Review Checklist after they have submitted the Review Checklist, or when the Grant status is changed to "Ready to Close" or "Closed".
3. Field Office Managers and Super Users can review checklists, provide approver comments, and attach relevant documents:
   - On Field Office Managers rejection of the Review Checklist, the system allows CPD Reps to once again modify the Review Checklists.
   - On Field Office Managers approval of the Review Checklist, the system changes the status of the Grant to "Ready for Closeout" and notifies HUD Super Users.
4. Super Users are only allowed to change grant status.

Entering Review Checklists

CPD Reps can enter checklists, provide comments, and attach relevant documents during the closeout document review.

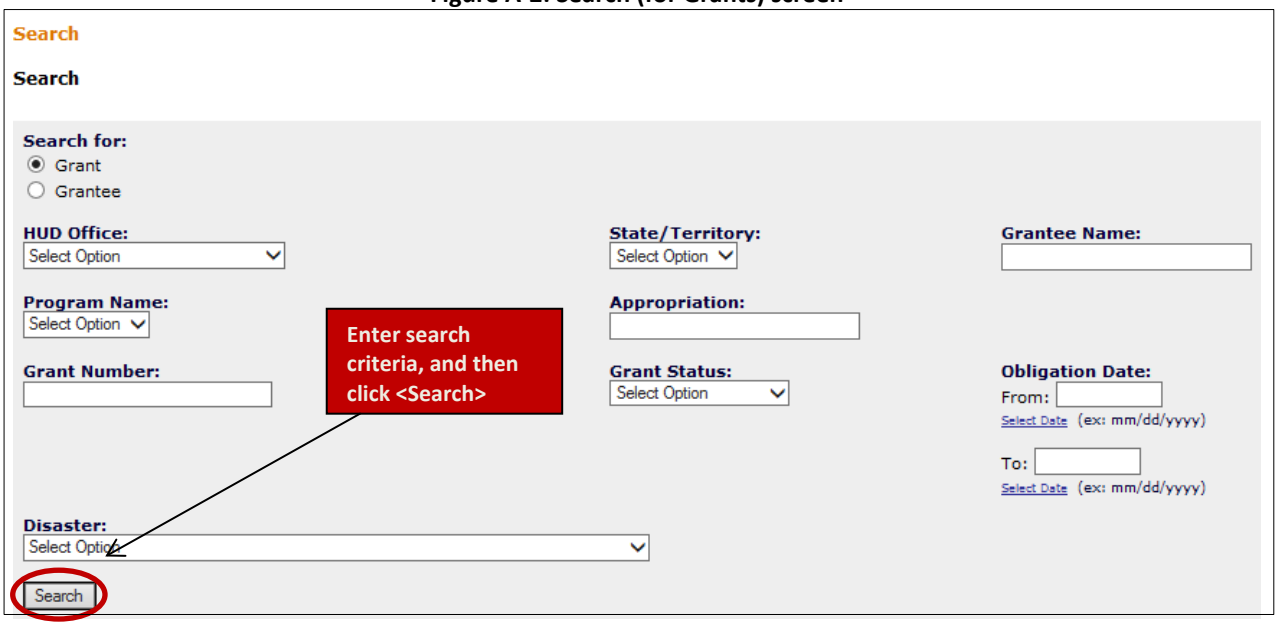
The process for entering Closeout Review Checklists is provided below:

1. After logging in and accepting the "Disclaimer," click the <**Grants**> link in the navigation bar.
   - The **"**View All Grants" screen is displayed (Figure A-1).

Figure A-1: View All Grants screen

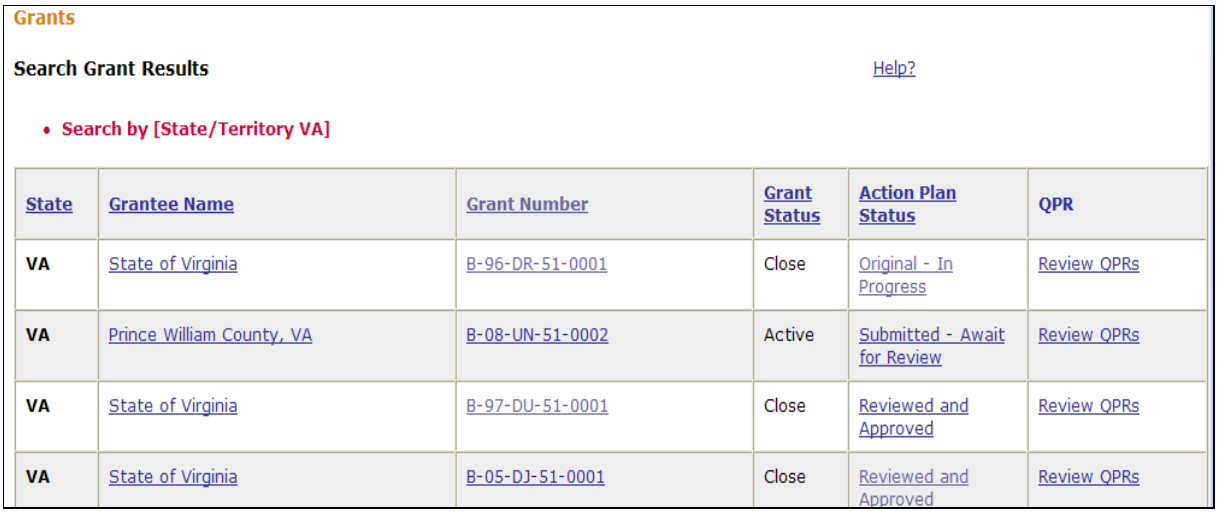
2. Click the <**Search**> link under Grants in the left column navigation box.
   - The "Search" screen is displayed (Figure A-2).

Figure A-2: Search (for Grants) screen



3. Enter search criteria, or leave all fields blank.
4. Click the <**Search**> button.
   - The "Search Grant Results" screen is displayed (Figure A-3).

Figure A-3: Search Grants Results screen



Grants

Search Grant Results

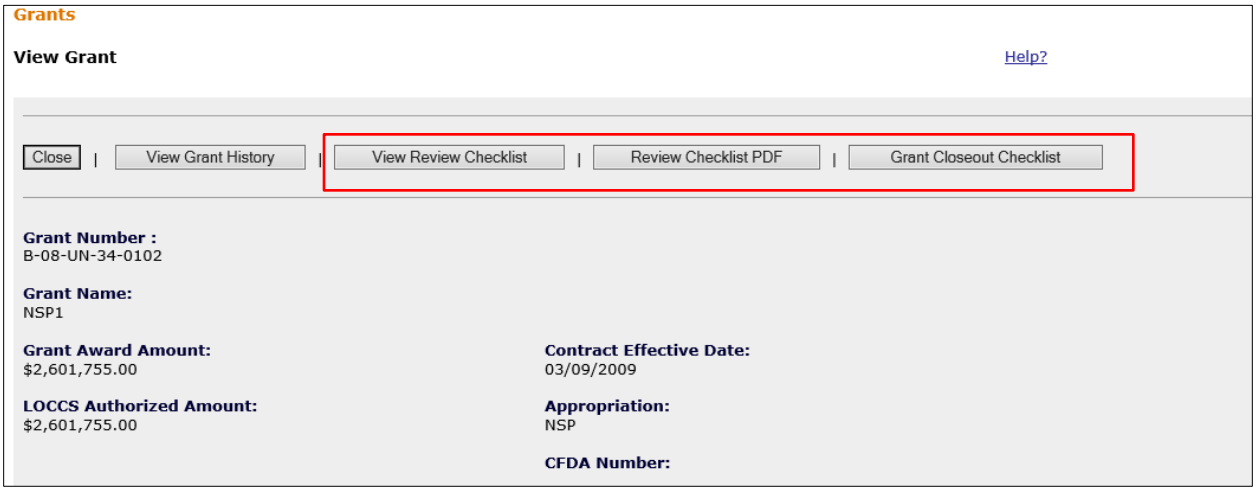
Help?

- Search by [State/Territory VA]

State	Grantee Name	Grant Number	Grant Status	Action Plan Status	QPR
VA	State of Virginia	B-96-DR-51-0001	Close	Original - In Progress	Review QPRs
VA	Prince William County, VA	B-08-UN-51-0002	Active	Submitted - Await for Review	Review QPRs
VA	State of Virginia	B-97-DU-51-0001	Close	Reviewed and Approved	Review QPRs
VA	State of Virginia	B-05-DJ-51-0001	Close	Reviewed and Approved	Review QPRs

5. Click a link in the 'Grant Number' column of the grant for which you want review for closeout.
   - The "View Grant" screen is displayed (Figure A-4).

Figure A-4: View Grant screen



6. Click the <**Grant Closeout Checklist**> button. Only CPD Reps for the Grant, Field Office Managers, and Super Users see the "Grant Closeout Checklist" button.
   - The "Review Checklist page" is displayed (Figure A-5).

Figure A-5: Review Checklist displayed page

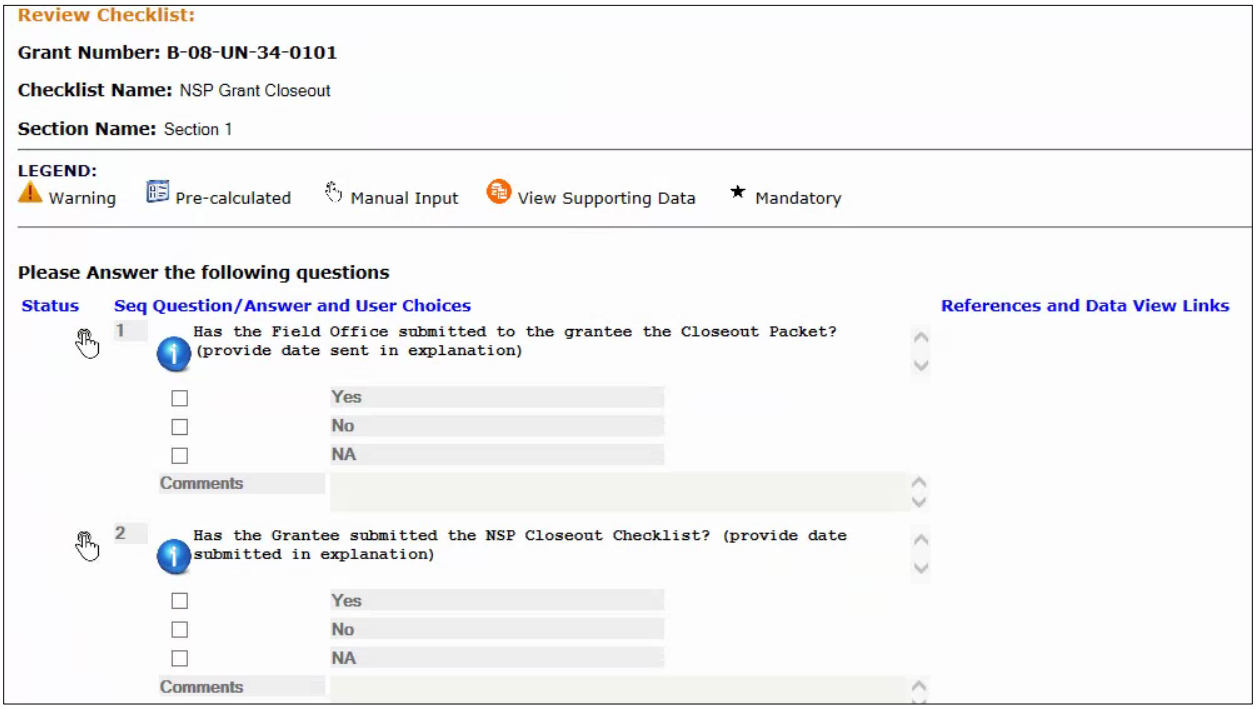
7. Select the <**Submit For Approve**> checkbox
   - Checking this checkbox will notify the appropriate Field Office Managers and Super Users that the Review Checklist has been completed and is ready for their review.

   Note: Once the CPD Rep Submits for Approve, they cannot access the Checklist for editing.

8. Select the <**Edit**> link next to any listed review sections.
   - The "Review Checklist – Section" screen (Figure A-6) is displayed. CPD Reps can provide answers and comments to the checklist questions.

   Note: In cases where there are no sections for editing, questions will not be displayed but the user can still provide comments and attach documents.

Figure A-6: Review Checklist page after Edit link



The following describes Review Checklist icons:

- **Mandatory questions** are annotated on the edit checklist page with the following icon: (*). Review checklists cannot be submitted if the user has not entered mandatory questions.
- Questions that are mandatory and do not have a response will be displayed with a **warning icon** as follows: ( ).
- Some question responses may be **auto-computed** by the system and are depicted with the following icon: ( ). If a response to a checklist question is auto-computed, then the system displays a non-editable answer. Although auto-computed responses may not be edited, the user can add comments.
- **Non-auto-computed** question responses are depicted with the following icon: ( ).
- Some questions can be configured to display the supporting data associated with the question, if applicable, to show the basis for the auto-computed responses. **Auto-computed responses with supporting data** will be annotated with the following icon: ( ). On selection of this icon, the system will open a new window to display the supporting data.

9. CPD Reps must complete the "Review Checklist – Section" page per guidelines.
   - Guidelines can be accessed by selecting the URLs associated with the Sections or each associated question.
   - Checklists are not solely question and answer based, and may require user inputs.
10. Click the <**Save Checklist**> button.
    - This action returns the user to the "Review Checklist" screen (Figure A-6).
11. Click the <**Save Review Checklist**> once all review sections are completed.

Approving Review Checklist

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

To approve a Review Checklist, follow the steps below:

1. Follow steps 1-6 of the 'Entering Review Checklist' process.
   - At the conclusion of these steps, the "Review Checklist" page is displayed.
2. Field Office Managers can provide comments in the Approve Comments narrative section (Figure A-7).

   Note: If the CPD Rep is also the Field Office Manager then the system allows the user to enter 'Review' and 'Approve' comments.
3. Select the <**Approve**> or <**Reject**> radio button.
   - Selection of <**Approve**> changes the status of the Grant and locks the screen for any further edits.

Figure A-7: Review Checklist - Approve Comments narrative section

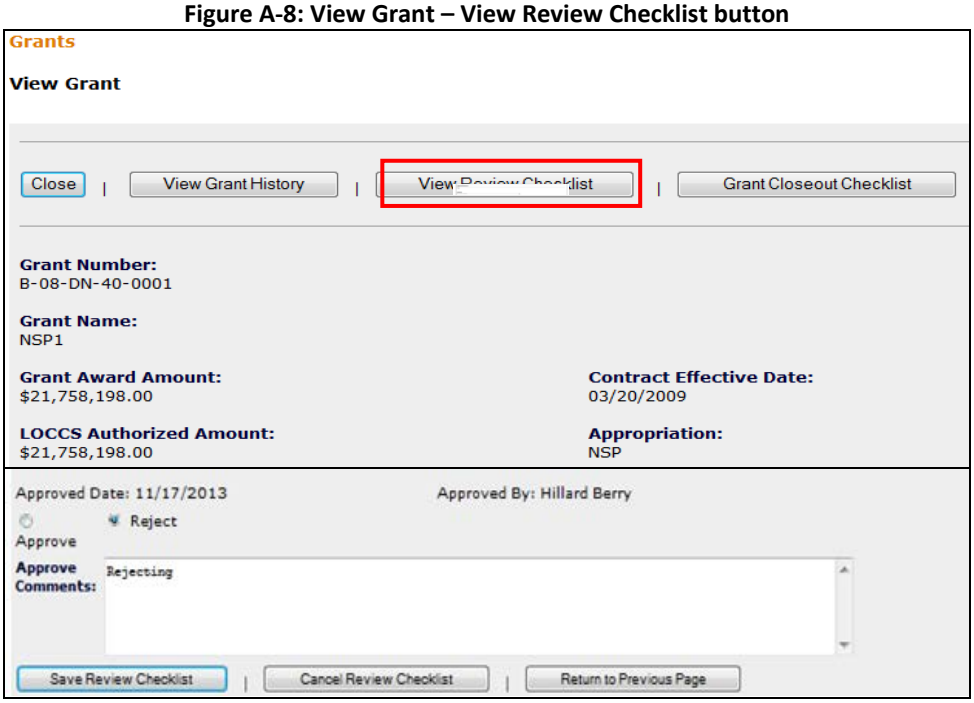
4. Click the <**Save Review Checklist**>.

View Reviewer Checklist

All users have access to view Closeout Checklists, using the following steps.

1. Follow steps 1-5 of the 'Entering Review Checklist' process.
   - At completion of these steps, the "View Grant" screen is displayed (Figure A-8).

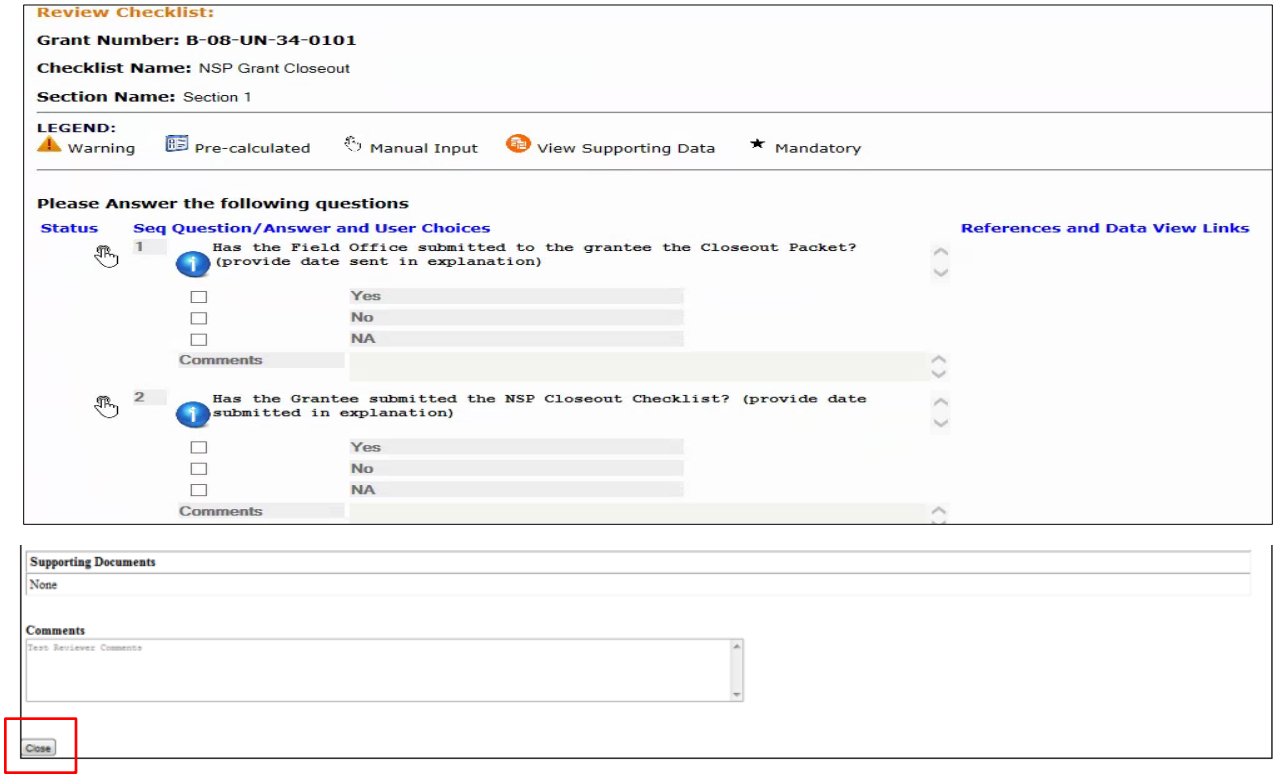
Figure A-8: View Grant – View Review Checklist button



2. Click the <**View Review Checklist**> button.

   - The system displays the review checklist with the answers, reviewer/approver comments, and attached documents (Figure A-9).

Figure A-9: View Review Checklist



3. Click the <**Close**> button to exit the screen.